

Panasonic

Call Centre Management Software User Manual

Model KX-A296/KX-A297



Please read this manual before using the Panasonic Call Centre Management Software.

Thank you for purchasing a Panasonic Call Centre Management Software, Model KX-A296/KX-A297.

About this User Manual

This User Manual is designed for uses of Panasonic Call Centre Management Software (CMS). CMS is a powerful tool that gives you the abilities to achieve the optimum call centre performance. Its functions include: automatic call distribution, real-time monitoring, logging and reporting, among other things.

This manual contains the following sections:

Section 1, Overview

Provides general information on this software including system capacity and specifications.

Section 2, Before Controlling CMS

Provides information on starting/exiting CMS and setting call distribution patterns.

Section 3, Configuration

Provides information on setting, assignment and configuration.

Section 4, CMS Operation

Provides information about how to use this software application effectively.

Section 5, Reports

Provides information on setting each report and printing out.

Section 6, Appendix

Provides the Troubleshooting and Quick Reference Guide.

Section 7, Index

Provides the Index.

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In this manual, the suffix of each model number is omitted.

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Section 1

Overview

1.1 Overview

1.1.1 About CMS

This chapter describes the basic concepts of CMS, which will help you supervise a small call centre with easy operation and improve its performance.

Panasonic Call Centre Management Software

CMS is a software application that provides users with the advanced call centre functions. It gives you the capabilities to control your KX-TD series Panasonic Digital Super Hybrid Systems (PBXs) from a PC via the CTI Interface.

CMS integrates the Automatic Call Distributor (ACD) features; with the ACD, you can automatically distribute all incoming calls to their appropriate destinations without an operator by configuring a variety of call handling patterns based on the Customer Database. Another advantage of this tool is its real-time monitoring functions. At all times, you can monitor the various important parameters such as call traffic status, queue status, agent performance, and so forth. In addition, you can generate a number of detailed reports for analysis on daily, weekly, and monthly basis. You can also gather call log data, which you can export into a CSV format file to make closer analysis with other applications.

Below are the main functions of this software:

- **Customer Manager**
Allows you to manage the customer information centralised in the Customer Database.
- **Agent Manager**
Allows you to manage the Agent information centralised in the Agent Database.
- **ACD Manager**
Allows you to monitor various important parameters relating to the call centre performance in real time.
- **Call Log Manager**
Allows you to monitor the call log information. It is also possible to output the log information to paper or export into a CSV format file.
- **Report Manager**
Allows you to generate various types of reports on the call centre performance. You can schedule a number of print jobs for automatic printing, or manually print or export the reports whenever as required.

1.1.2 *Special Terms and Definitions*

This section introduces the special terms you will encounter frequently while operating CMS and using this manual, and provides you with their definitions.
Please familiarise yourself with following information:

Supervisor:

The Supervisor is the manager of the call centre. The Supervisor can control the Agent log in/out from the console, and is responsible for changing the call treatment methods according to the traffic of calls in the call centre.

Agent:

An Agent, each assigned to a specific Agent Group, is a member of the call centre who is responsible for answering calls distributed to that Agent Group by CMS.

Customer:

A customer is a calling party of incoming calls. CMS can automatically transfer a customer to the desired Agent (or Agent Group) according to the pre-programmed distribution patterns.

ACD Call:

The incoming calls that arrive at the call centre directly are called ACD Calls. CMS will automatically distribute the ACD Calls according to the pre-programmed distribution patterns.

Non ACD Call:

In some cases, calls that have arrived at the extensions outside the call centre need to be transferred to the call centre. (For example, when a company operator receives a call of customer inquiry, the operator may want to transfer the call to the call centre when it is likely that better customer support can be provided.)

In this case, the transferred calls to the call centre are called Non ACD Calls. CMS will automatically distribute the Non ACD Calls according to the pre-programmed distribution patterns, in the same way it handles the ACD Calls.

It is possible to monitor the ACD Calls and Non ACD Calls separately on the monitoring screens and reports.

ACD Queue:

The ACD Queue is where the calls first arrive when they enter the call centre. The calls in the ACD Queue will be distributed to the available Agents according to the pre-programmed distribution patterns.

If all the Agents are unavailable, the callers will hear various greeting messages and/or music on hold while waiting in the ACD Queue, provided that the message flow has been set.

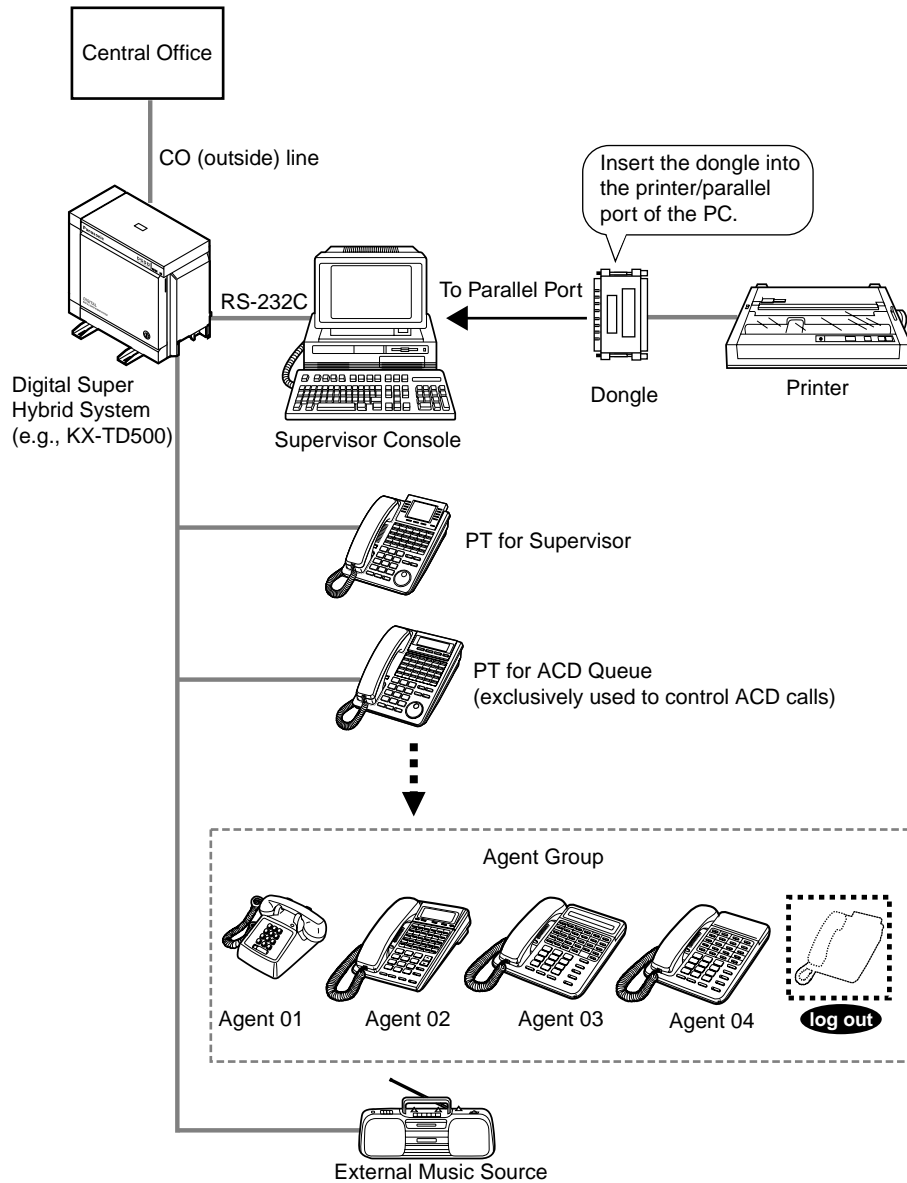
Notes

When setting parameters, please keep in mind the following terminology:

- "Dialling Characters" consist of the digits 0-9 and the characters # and * (parentheses [()] and hyphen [-] are not included).
- "Characters" consist of all ASCII characters.

1.1.3 System Configuration

System Connection Diagram



System Capacity & Specification

	PBX Model		
	KX-TD500 (max.)	KX-TD1232 (max.)	KX-TD816 (max.)
Trunk (outside line)	192	38/42 ^{*1}	8
Extension Lines	448	64	32
Back Ground Music (BGM) Port	2	2	2
Out Going Message (OGM) Port	32 (8 types) ^{*2}	2	2
Agent ID	512	128	128
Agent Log in	24	16	16
Supervisor ID	1	1	1
Supervisor Log in	1	1	1
Supervisor Console	1	1	1
Agent Group	16	16	16
Waiting Calls	24	24	24
ACD Queue device (Proprietary Telephone [PT]) ^{*3}	1	1	1
Agent Ext (Single Line Telephone [SLT]/PT)	24	16	16
IDLE Ext (for Non ACD Call Transfer) ^{*4}	16	16	16

^{*1} The maximum number of trunks depends on your country.

^{*2} The maximum number of OGM ports depends on optional cards (for details, consult your dealer).

^{*3} For details, see "3.1.1 Setting System Parameters".

^{*4} For details, see "3.1.2 Setting Non ACD Call Transfer".

System PC Requirements

Operating System	Windows 98, Windows Me, Windows 2000, Windows NT Workstation 4.0 Service Pack 5 or later	
System Requirements (Minimum Required)	CPU	Pentium II 300 MHz or higher
	RAM	64MB or more
	HDD	40MB

Proprietary Telephones

The following Panasonic PTs are recommendable with this system.

It is effective to use a DPT with 24 Flexible CO buttons for ACD Queue extension.

PTs	Description
KX-T7220	Digital, speakerphone, 24 Flexible CO buttons
KX-T7230	Digital, 2-line display, speakerphone, 24 Flexible CO buttons
KX-T7425	Digital, speakerphone, 24 Flexible CO buttons
KX-T7433	Digital, 3-line display, speakerphone, 24 Flexible CO buttons
KX-T7436	Digital, 6-line display, speakerphone, 24 Flexible CO buttons
KX-T7531*	Digital, 1-line display, 12 Flexible CO buttons
KX-T7533*	Digital, 3-line display, 12 Flexible CO buttons
KX-T7536*	Digital, 6-line display, 12 Flexible CO buttons

* You can attach the KX-T7545 (Add-on Key Module) to equip the telephone with extra 12 Flexible CO buttons.

Notes

- If connected to the KX-TD1232 double cabinets, this software is only available with the master PBX.
- An optional card is required for OGM port of PBX.
- The system must have at least one PT connected as well as the PTs for the Supervisor and Agents. Although both Analogue Proprietary Telephone (APT) and Digital Proprietary Telephone (DPT) are available with the system, the number of calls that can be queued depends on the number of Flexible CO buttons on the telephone.
- A specific idle extension must be assigned for each Agent Group as the transfer destination of calls that have initially arrived at the extensions outside the call centre, in order for them to be handled as Non ACD Calls by CMS, see "3.1.2 Setting Non ACD Call Transfer".
- The examples given in this manual (e.g., screens, shots, etc.) are the images when connected to the KX-TD1232.
- This product is not available for Portable Station, cordless (other than the cordless telephones for SLT) and Integrated Service Digital Network (ISDN) telephone users.

Section 2

Before Controlling CMS

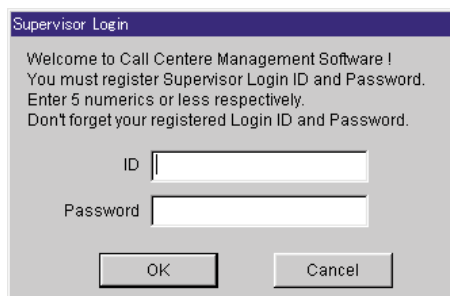
2.1 Starting and Exiting CMS

2.1.1 Starting CMS

When you log in to CMS for the first time, you must establish the **ID** and **Password** for Supervisor Login. The ID and Password registered here will automatically be stored in the Agent Database (see "3.2.3 Registering an Agent"). After the second time, enter these **ID** and **Password** to log in to CMS.

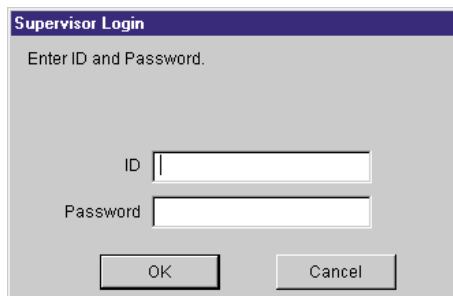
◆◆ Logging in to CMS

1. Choose Program\PanasonicCMS from the Start menu and open **PanasonicCMS**.
 - When logging in for the first time:



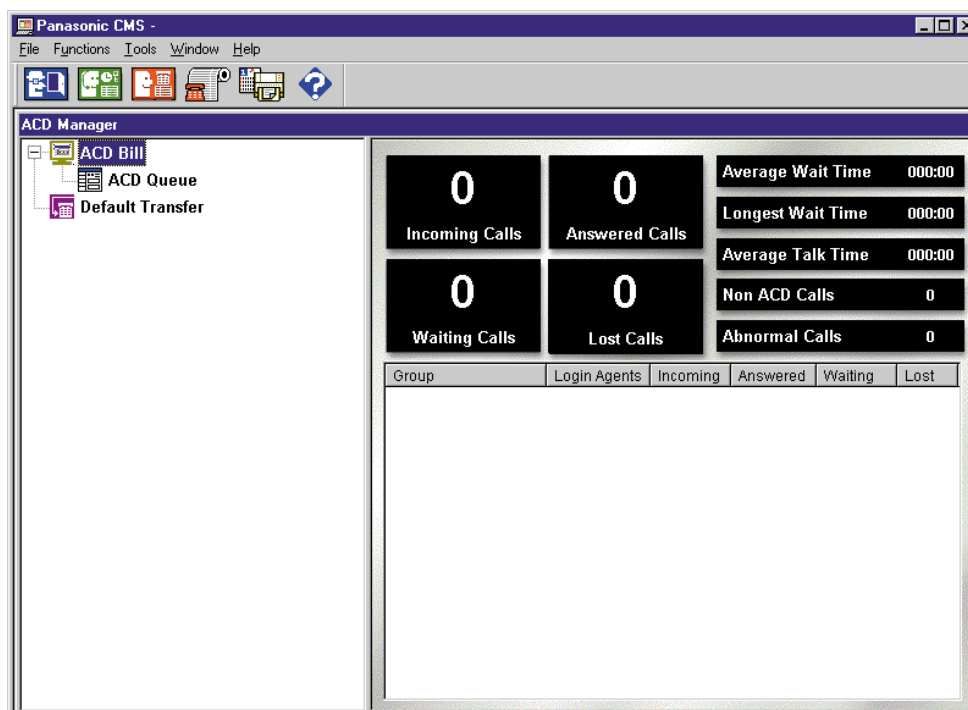
The dialog box is titled "Supervisor Login". It contains the following text: "Welcome to Call Center Management Software !", "You must register Supervisor Login ID and Password.", "Enter 5 numerics or less respectively.", and "Don't forget your registered Login ID and Password." Below the text are two input fields: "ID" and "Password". At the bottom are "OK" and "Cancel" buttons.

- When logging in for and after the second time:









The dialog box is titled "Supervisor Login". It contains the text: "Enter ID and Password." Below this text are two input fields: "ID" and "Password". At the bottom are "OK" and "Cancel" buttons.

2. Enter the **ID** (up to 5 digits) and **Password** (up to 5 digits), then click **OK**.
To change the ID and/or Password, see "3.2.3 Registering an Agent".



◆ **To use the icons on the tool bar:**

The icons on the tool bar provide quick access to some of the CMS functions. See the table below for descriptions of the icons:

Supervisor Logout Icon	Agent Manager Icon	Customer Manager Icon
 Allows the Supervisor to log out from CMS*.	 Opens the Agent Manager screen.	 Opens the Customer Manager screen.
Call Log Manager Icon	Report Manager Icon	Help Icon
 Opens the Call Log Manager screen.	 Opens the Report Manager screen.	 Opens the On-line Help for assistance.

* **CMS will remain in operation even after the Supervisor has logged out.**

2.1.2 Exiting CMS

There are 2 ways to exit from CMS: to terminate CMS, or to log out from CMS.


◆◆ Terminating CMS


When you terminate CMS, all CMS operation, including the logging of call information, will be finished. This will also log out all the Agents.

1. From the menu bar, choose **File** → **Exit**.
2. Enter the **ID** and **Password**, then click **OK**.
The ID and Password are the ones you have used to log in.

◆◆ Logging out from CMS

Even when you log out from CMS, all CMS operation will still remain active.

1. On the tool bar, click .
2. Click **OK** to the confirmation message.

 You can still find  in the task bar (see the bottom right corner of your PC screen).
This indicates that CMS is still active.

◆ To log in to CMS again:

1. On the task bar, click .
2. Enter the **ID** and **Password**, then click **OK**.

2.2 Deciding the Call Distribution Pattern

2.2.1 Automatic Call Distribution

CMS automatically distributes the incoming calls by the pre-programmed methods. When you configure the call distribution patterns, consider the following:

- Receiving Agent Group
- Receiving Agent
- Overflow
- Wait Limit Time

◆◆ Deciding the Agent Group to Receive the Calls

There are 2 methods for distributing calls among different Agent Groups:

1. DDI/DID number based call distribution (recommended)

The Supervisor can assign specific DDI/DID number(s) to the desired Agent Group. The incoming calls with the specified DDI/DID number(s) will automatically be distributed to the assigned Agent Group (for more information, see "3.1.3 Setting DDI (Direct Dialling In)/DID (Direct Inward Dialling) Number").

The DDI/DID numbers can also be assigned to the Agent(s).

2. Trunk number based call distribution

The Supervisor can assign specific trunk number(s) to the desired Agent Group. The calls without DDI/DID numbers can also be distributed automatically to the assigned Agent Group based on the trunk number (for more information, see "3.1.4 Assigning a Trunk Number").

◆◆ Deciding the Agent to Receive the Calls

There are 2 methods for distributing calls among different Agents within a specific Agent Group (for more information, see "3.2.1 Configuring an Agent Group"):

1. Uniform Call Distribution (UCD)

The incoming calls will be distributed evenly among the Agents within the Agent Group.

2. Trunk number based call distribution

The next incoming call will be distributed to the Agent who has been idle for the longest time at the moment.

◆◆ **Deciding the Overflow Time and Group**

When the traffic of calls is too heavy for an Agent Group, CMS can transfer the calls waiting in the ACD Queue to another Agent Group in the order of their arrival to the call centre. For each Agent Group, the Supervisor can set the following parameters (for more information, see "3.2.1 Configuring an Agent Group"):

1. Overflow Time

The **Overflow Time** is the period of time that a call must wait in the ACD. If the **Overflow Time** expires before the call is answered, the call will be transferred to another Agent Group.

2. Overflow Group

The **Overflow Group** is the Agent Group to which the calls will be transferred if the **Overflow Time** expires while they are waiting in the ACD Queue.

◆◆ **Deciding the Wait Limit Time**

As explained above, the calls can be transferred to an overflow Agent Group if their waiting time exceeds the overflow timer. However, it is possible that the Agents in the overflow Agent Group are busy.

Therefore, the Supervisor can specify another set of timer and transfer destination; Wait Limit Time and Default Transfer Extension (for more information, see "3.1.1 Setting System Parameters"):

1. Wait Limit Time

The **Wait Limit Time** is the maximum length of total waiting time of calls since their first arrival to the call centre. If the **Wait Limit Time** expires before the call is answered, the call will be transferred to a backup extension.

Only 1 **Wait Limit Time** can be set for CMS.

2. Default Transfer Extension

The **Default Transfer Extension** is the backup extension to which the calls will be transferred if the **Wait Limit Time** expires while they are waiting.

If this extension is also busy, the calls can be sent back to the ACD Queue again, and will be connected as soon as the **Default Transfer Extension** or an Agent becomes available. Because the **Default Transfer Extension** is the final backup for the incoming calls, it is recommended that you connect a Voice Mail system to this extension, or select the extension that is likely to be available most of the time.

Section 3

Configuration

3.1 Basic Configuration

3.1.1 Setting System Parameters

This section describes how to set system parameters. The changes made in the System screen will affect the whole system operation.

From the menu bar, choose **Tools** → **System**.

Descriptions of each field:

Field	Parameter (Default)	Description
Date Format	YYYY/MM/DD MM/DD/YYYY DD/MM/YYYY (YYYY/MM/DD)	Specifies the format in which the date will be displayed. There are 3 options: <ul style="list-style-type: none"> • YYYY/MM/DD (e.g., 2001/10/01) • MM/DD/YYYY (e.g., 10/01/2001) • DD/MM/YYYY (e.g., 01/10/2001) (YYYY=Year; MM=Month; DD=Day)
Time Format	12hr/24hr (24hr)	Specifies the format in which the time will be displayed. There are 2 options: <ul style="list-style-type: none"> • 12hr (e.g., 09:10) • 24hr (e.g., 21:10)

Field	Parameter (Default)	Description
Abnormal Call Threshold Time	0-3600 (10)	Specifies the period of time (in seconds) within which a call will be regarded "Abnormal" if it is lost. Set this parameter to "0" if you do not want to specify the threshold time.
ACD Queue Ext	All available extensions other than Default Transfer (None)	Assigns the extension at which the incoming calls will first arrive. It is recommended you use a DPT with 24 Flexible CO buttons. Do not perform any operation manually from this extension; reserve this extension for call receiving/transferring use only.
Wait Limit Time	0-3600 (180)	Specifies the maximum length of waiting time (in seconds) of incoming calls since their first arrival to the call centre. When this limit expires while the calls are still waiting, they will be transferred to the Default Transfer Ext. The Wait Limit Time must be specified shorter than the waiting time that has been set in PBX. Set this parameter to "0" if you do not want to specify the limit.
Default Transfer Ext	All available extensions other than ACD Queue Ext (None)	Specifies the destination extension to which a call will be transferred if it remains unanswered in the ACD Queue and Wait Limit Time expires.
Auto Register of Customer Data	—	Check if you want to register callers' information in the Customer Database automatically.
ACD Reset Time	00:00-23:59 (0:0)	Specifies the time at which CMS will clear the counters (once every day).
Agent Manager Mode	Icon/List (Icon)	Specifies the display format of the Agent Manager screen (see "4.1.1 Managing the Agents" for the screen image).
OGM Use	—	When checked, the use of the corresponding OGM is enabled (see "3.2.2 Setting Message Flows"). OGM5-9 are only available for the KX-TD500 users.
OGM Port	1-2 (KX-TD816/1232) 1-32 (KX-TD500)	Specifies the OGM Port number. The maximum number depends on your PBX model. (For details, see "1.1.3 System Configuration".)

◆ ***To configure the System Parameters:***

1. Specify the setting.
2. Do one of the following:
 - Click **Apply** to update the data.
 - Click **OK** to update the data and close the System screen.
 - Click **Cancel** to cancel the setting and close the System screen.

3.1.2 Setting Non ACD Call Transfer

This section describes how to specify the setting for transferring Non ACD Calls (i.e., the incoming calls that have been transferred to the call centre via extensions assigned as the Non ACD Call Transfer) to the appropriate Agent Groups. For CMS to distribute calls that have initially arrived at the extensions outside the call centre according to the pre-programmed distribution patterns (in the same way the CMS distributes calls that have arrived at the call centre directly), the calls must enter the call centre through a special route. They must first be transferred to the idle extension assigned for the desired Agent Group from outside the call centre. Only then, CMS will be able to distribute the transferred calls (Non ACD Calls) among the Agents within the Agent Group.

You must assign the following items in your PBX before setting CMS:

- **Call distribution type for each extension group**
- **Overflow destination when all extensions in a UCD group are busy**
- **Queuing sequence in UCD Time Table**
- **Extension group for each extension**

From a PT, an operator must set the DND feature (Do not disturb: Refuse incoming calls) to the extension receiving a Non ACD Call.

For details about the PBX programming, consult your dealer.

From the menu bar, choose **Tools** → **System**. The System screen appears. Click the **Non ACD Call Setting** tab.

Agent Group	Ext	Hunt Group
Sales	110	128
Support	230	002
Group03		
Group04		
Group05		
Group06		
Group07		
Group08		
Group09		
Group10		
Group11		
Group12		

Agent Group: Sales

Ext: 110

Hunt Group: 128

OK Apply Cancel

Descriptions of each field:

Field	Parameter (Default)	Description
Agent Group	—	Automatically reflects the name of the Agent Group that has been selected in the Agent Group list window.
Ext	All available extensions (None)	Assigns an idle extension to each Agent Group. The calls must be transferred to this extension for CMS to handle them as Non ACD Calls. <i>The extension number must be an unused one within the Hunt Group.</i>
Hunt Group	— (None)	Select the Hunt Group to which the extension assigned in Ext belongs.

◆ **To set transfer destination for Non ACD calls:**

1. Select the desired **Agent Group** in the Agent Group list window. The Group name of the selected Agent Group will reflect in **Agent Group**.
2. Specify the setting.
***A specific idle extension must be assigned for all Agent Groups.
The assigned extension must exist in the paired Hunt Group; otherwise, the Non ACD Calls will not be distributed properly. For the list of idle extensions and their corresponding Hunt Groups, ask your dealer.***
3. Do one of the following:
 - Click **Apply** to update the data.
 - Click **OK** to update the data and close the screen.
 - Click **Cancel** to cancel the setting and close the screen.

3.1.3 Setting DDI (Direct Dialling In)/DID (Direct Inward Dialling) Number

This section describes how to distribute calls to specific destinations based on their DDI/DID numbers. You can assign an Agent or Agent Group to each individual DDI/DID number.

From the menu bar, choose **Tools** → **Trunk**.

The screenshot shows a window titled "Trunk" with a tab labeled "DDI/DID". Inside the window is a table with the following data:

DDI/DID Number	Destination	Rank
1234435546	Paul / Manager Group	1

Below the table, there are four input fields:

- DID Number: 12244444656
- Agent Group: Manager Group
- Agent: None
- Rank: 1

At the bottom of the window, there are three buttons: "Add", "Delete", and "Close".

Descriptions of each field:

Field	Parameter (Default)	Description
DID Number	UP to 30 digits (None)	Specifies the DDI/DID number to each Agent or Agent Group. The calls without DDI/DID numbers will be distributed based on the trunk number assignment (for details, see "3.1.4 Assigning a Trunk Number"). <ul style="list-style-type: none"> • Direct Dialling In (DDI)—Provides automatic direction of incoming calls via ISDN line to specific destinations. • Direct Inward Dialling (DID)—Provides automatic direction of incoming calls to specific destinations according to the subscriber numbers sent from the Central Office.
Agent Group	01-16 (Group 01)	Specifies the Agent Group to which the calls with the DDI/DID number specified in the DID Number will be forwarded.
Agent	All Agents that are assigned to a selected Agent Group (None)	Specifies the Agent to which the calls with the DDI/DID number specified in the DID Number will be forwarded.
Rank	1-9 (1)	Specifies the priority order of calls. If several calls distributed to the same Agent or Agent Group are waiting in the ACD Queue, the call whose DDI/DID number has been assigned the highest rank (9 to 1 from the highest to the lowest) among them will be answered first.

◆ **To assign a new DDI/DID number:**

1. Specify the setting.
2. Click **Add**. The data which you entered will be added to the DDI/DID Database and displayed as the last entry in the DID List window.
After added, the Add button changes to Modify button.

◆ To modify the existing data:

1. Select the desired DID number in the DID List window. The fields (**DID Number**, **Agent Group**, **Agent**, and **Rank**) will reflect the current data.
2. Modify the desired data.
3. Click **Modify**. The data will be modified and displayed in the DID List window.

◆ To delete the existing data:

1. Select the DID number which you want to delete in the DID List window.
2. Click **Delete**. The selected data will be deleted.

Note

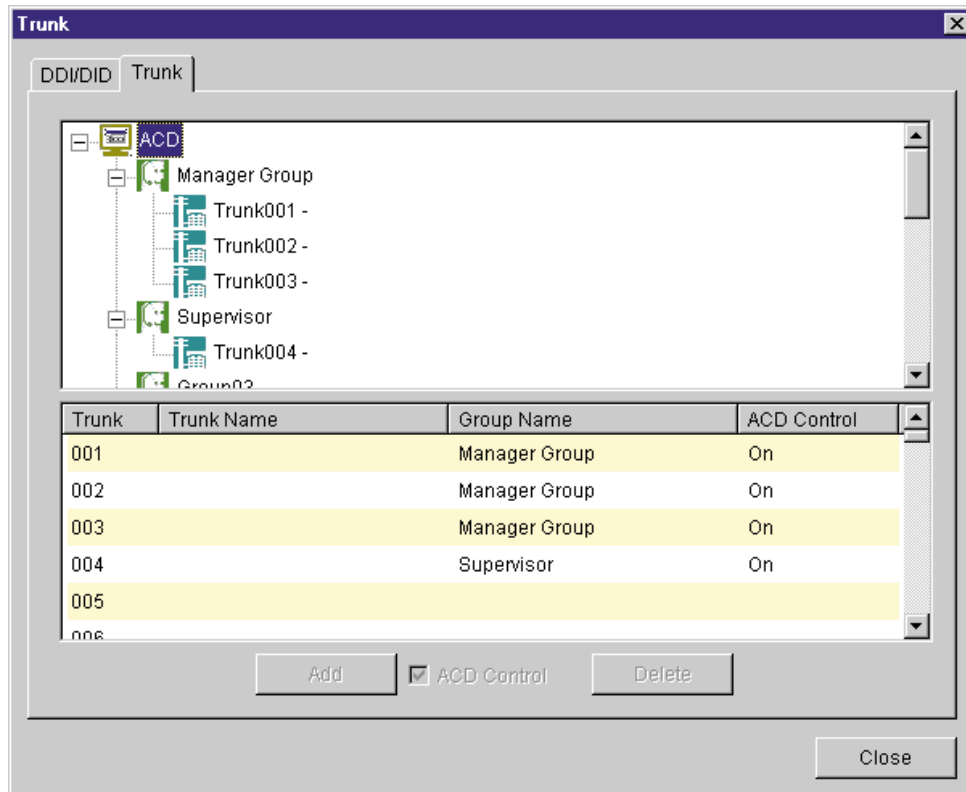
To distribute calls using their DDI/DID numbers as programmed, it is important that you instruct CMS to recognize these numbers. Therefore, in the Trunk Assignment screen, you must make sure that the trunks are capable of handling calls with DDI/DID information (for more information, see "3.1.4 Assigning a Trunk Number").

3.1.4 Assigning a Trunk Number

This section describes how to assign the trunk number to the desired Agent Group; when assigned, calls will be distributed to a specific Agent Group based on the specified trunk number. If you want to assign a trunk for receiving calls with DDI/DID information only, you must check **ACD Control** after setting DDI/DID number(s) (see the next page).

You must assign the destination extension for incoming calls to be directed in your PBX before setting CMS. For details, consult your dealer.

From the menu bar, choose **Tools** → **Trunk**. Click the **Trunk** tab.



◆◆ Assigning a Trunk to a Specific Agent Group

If you want to assign a trunk number to a specific Agent Group, do as follows:

1. Select appropriate items in the following windows:
 - Agent Group (in the ACD Trunk Tree view)
 - Trunk number (in the bottom window)

When assigned, ACD Control is checked automatically to indicate that the assigned trunk has become active in the system.

2. Click **Add**. The trunk data will be updated. The destination Agent Group number and name will appear on the appropriate line in the bottom window; the selected trunk will appear under the selected Agent Group in the ACD Trunk Tree view.

◆ **To modify the trunk assignment:**

1. Select the trunk number to be assigned to another Agent Group in the ACD Trunk Tree view.
2. Click **Delete**. The selected trunk number will be released from its Agent Group.
3. Follow steps 1 and 2 in "Assigning a Trunk Number to a Specific Agent Group" explained above.

◆ **To delete the assigned trunk:**

1. Select the trunk which you want to delete in the ACD Trunk Tree view.
2. Click **Delete**. The selected trunk will be deleted.

◆◆ **Assigning a Trunk for Receiving Calls with DDI/DID Information Use Only**

If you want to receive calls with DDI/DID number(s) only, do as follows: If set, the trunk will only receive calls with DDI/DID number(s) and refuse any calls via the analogue line.

1. Select the trunk to be assigned as the trunk for calls with DDI/DID number.
2. Check **ACD Control**.
The ACD Control in the bottom window will be on, and the Group Name is left blank to indicate that the specified trunk will be used only for receiving calls with DDI/DID information.

Note

You must assign DDI/DID number(s) to a specific Agent or Agent Group in advance.

3.2 Before Managing Agents

3.2.1 Configuring an Agent Group

This section describes how to configure particular Agent Groups. A maximum of 16 Agent Groups can be configured, each with specific setting. Each Agent Group can have its own call distribution patterns and greeting messages, which can be changed according to the time of the day by **Zone** setting. A maximum of 6 **Zones** can be set per day (a 24-hour period).

From the menu bar, choose **Tools** → **Group**.

	Start Time	Distribution	Overflow Time	Overflow Group	Message
<input checked="" type="checkbox"/> Zone 1	7 : 0	UCD	60 Sec	Supervisor	A
<input checked="" type="checkbox"/> Zone 2	13 : 0	None	10 Sec	None	None
<input checked="" type="checkbox"/> Zone 3	13 : 15	Longest Idle	60 Sec	Supervisor	A
<input checked="" type="checkbox"/> Zone 4	23 : 59	None	10 Sec	None	C
<input type="checkbox"/> Zone 5	0 : 0	None	10 Sec	None	None
<input type="checkbox"/> Zone 6	0 : 0	None	10 Sec	None	None

Holiday

Su	M	Tu	W	Th	F	Sa	None	10 Sec	None	None
----	---	----	---	----	---	----	------	--------	------	------

Descriptions of each field:

Field	Parameter (Default)	Description	Input Required
Group Name	Up to 20 characters (Group01)	Specifies the name for the Agent Group. <i>The name of the tab reflects the entered Group Name.</i>	✓
Wrap-up Time	0-3600 (20)	Specifies the period of time (in seconds) reserved after each call for the Agents to record the result of the call. During Wrap-up Time , no call will be distributed to the Agent. <i>Entering the Result Code</i> (see "3.4.1 Setting Feature Codes") <i>will automatically finish the Wrap-up Time; the Agent will be ready to receive calls.</i>	
Validate	—	When checked, the Agent Group will be active in the call centre.	✓
Zone 1-6	—	When checked, the setting for the corresponding Zone will be enabled. <i>At least 1 Zone must be enabled.</i>	✓
Start Time	00:00-23:59 (0:0)	Specifies the start time of the corresponding Zone in 24-hour clock; calls will be handled according to the call distribution pattern set applied for the Zone until the start time of the next Zone that has been validated. <i>Start Time cannot overlap. It is recommended that you specify a Start Time specifically for non-business hours (see "Recommended Setting" at the end of this section).</i>	✓
Distribution	UCD/ LongestIDLE /None (None)	Specifies the call distribution pattern for each Zone. There are 3 options: <ul style="list-style-type: none"> • Uniform Call Distribution (UCD)—Distributes incoming calls evenly among the Agents within the Agent Group. • LongestIDLE—The next incoming call will arrive at the extension of the Agent who has been idle for the longest time at the moment. • None—No Agent in the Agent Group can answer incoming calls. The call will either be sent immediately to the Overflow Group (if specified) or the Agent Group defined as the Default Transfer Ext (see "3.1.1 Setting System Parameters"). 	✓

Field	Parameter (Default)	Description	Input Required
Overflow Time	10-3600 (10)	Specifies the period of time (in seconds) that a call must wait in the ACD Queue before it can be transferred to the Overflow Group for each Zone.	✓
Overflow Group	All groups other than the original group (None)	Specifies the Agent Group to which a call will be transferred if Overflow Time expires while the call is waiting in the ACD Queue for each Zone. If you do not specify any Overflow Group, the call will be transferred to the Agent Group defined as the Default Transfer Ext. For details, see "3.1.1 Setting System Parameters".	✓
Message	None, A-Z (None)	Specifies the message to play while the call is waiting in the ACD Queue for each Zone. To set message sequences, click Message Patterns... to display the Message Patterns screen. For details, see "3.2.2 Setting Message Flows".	✓
Holiday	Sunday-Saturday (—)	Specifies the desired day(s) of the week as holiday(s). See "Recommended Setting" at the end of this section.	

The items with a check mark (✓) must be specified.

◆ **To set call distribution patterns for Agent Groups:**

1. Click a tab for the desired Agent Group and specify the setting.
2. Do one of the following:
 - To update the data and set another Agent Group, click **Apply**. Repeat steps 1 and 2.
 - To finish setting, click **OK**. The data will be updated and the Group screen closes.
 - To cancel the setting, click **Cancel**. The Group screen closes.

◆ **Recommended Setting**

For non-business hours and holidays, you might want to play special messages to provide callers with information about, for example, the business hours of your office, instead of distributing calls within an Agent Group as in regular business hours.

Follow the procedure below to apply this setting:

1. Do one of the following:
 - To set messages to non-business hours:
Specify the start time of the after hours time period in the desired **Start Time** for the desired Zone 1-6, and enable the setting by checking the corresponding checkbox (**Zone 1-6**).
 - To set messages to holiday:
Specify the desired day(s) of the week as holiday(s) in **Holiday**.
2. Set **Distribution** and **Overflow Group** to **None**, and select the desired message type (**A-Z**) in **Message**.
3. Click **OK** or **Apply**.

3.2.2 Setting Message Flows

This section describes how to set up to 26 patterns (A-Z) of message flows. Each message flow can have up to 7 sequences (see the table below) of specific length of time. The message flow decides what kind of greeting message(s) and/or music the callers on hold will hear while waiting in the ACD Queue.

You must assign the maximum allowable recording time for Outgoing Message Time in your PBX before setting CMS. For details, consult your dealer.

From the menu bar, choose **Tools → Message**.

Descriptions of each field:

Field	Parameter (Default)	Description
MSG Type	A-Z (A)	Specifies the message pattern (A-Z) to be set.
Sequence1-7	None, OGM1-4(8), BGM1-2 (None)	Specifies the message (OGM) or background music (BGM) to play while a caller is on hold for each Sequence 1-7 . The maximum number of available OGMs depends on your PBX model. (For details, see "1.1.3 System Configuration".)
Sec	0-3600 (None)	Specifies the length of time (in seconds) the caller will hear the background music if BGM1 or BGM2 is selected as a sequence. When OGM is selected, "Sec" is not available.

◆ **To set message flow pattern:**

1. Select the message pattern in **MSG Type**.
2. Select the message or background music to play for **Sequence1-7**.
When you select **BGM1** or **BGM2**, you must also specify its playing time in **Sec** during which the caller hears the BGM.
You can also specify setting in the field at the bottom of the screen:
 - **None**—Stops the message flow; the call will stay in the ACD Queue until answered or transferred.
 - **Go to 1-7**—Brings back the message flow to the specified sequence; the message flow repeats itself until the call is answered or transferred.
 - **BGM1-2**—Plays the selected BGM until the call is answered or transferred; you must also specify its playing time in **Sec**.
 - **Drop**—Disconnects the call.
3. Do one of the following:
 - To set another **MSG Type**, click **Apply**. The message flow will be registered. Repeat steps 1 through 3.
 - To finish setting, click **OK**. The setting will be updated and the Message Patterns screen closes.

Note

You can record and play back OGMs from your PT.

To record:

1. Off-hook.
2. Press **Feature no.*** and **OGM no.**
3. Record a message.
4. Press **STORE** button. You can hear the recorded message.
5. On-hook.

To play back:

1. Off-hook.
2. Press **Feature no.*** and **OGM no.** You can hear the message.
3. On-hook.

* Feature numbers have been set in the PBX programming. Consult your dealer about Feature number.

3.2.3 Registering an Agent

This section describes how to register a new Agent, as well as delete/modify the existing data. ***When the Supervisor has already established the ID and Password, this information will be automatically registered in the Agent Properties screen.***

From the menu bar, choose **Functions** → **Agent Manager**. Click **Properties** in the Agent Manager screen.

Descriptions of each field:

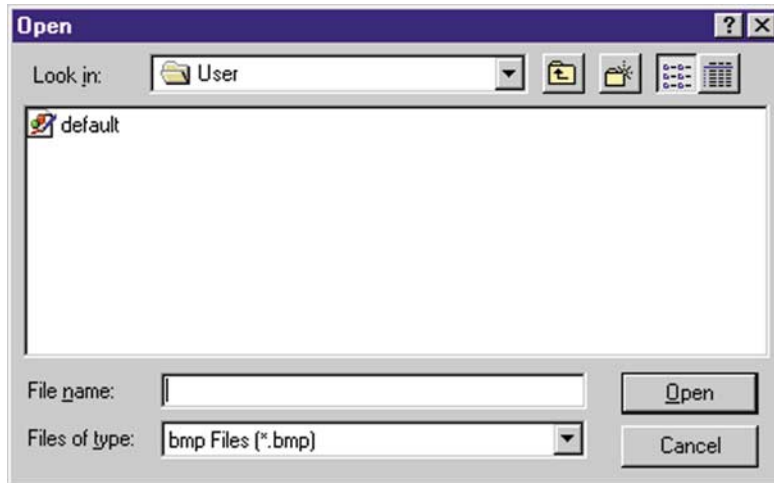
Field	Parameter (Default)	Description	Input Required
Agent	Up to 20 characters (None)	Specifies the name or nickname of the Agent. <i>Specified name will appear in the tree view window</i> (see, "4.1.2 Monitoring the Call Centre Status" for your reference).	✓
Agent ID	Up to 5 digits (None)	Specifies the Agent ID to be entered when the Agent logs in as the Supervisor (for details about Supervisor login, see "2.1.1 Starting CMS").	✓

Field	Parameter (Default)	Description	Input Required
Supervisor	—	Authorises the Agent with the Supervisor privilege. <i>The Agent with the Supervisor privilege will be able to manage CMS by entering the Agent ID and the password; logging in to CMS without entering the Password is also possible</i> (for more information, see "2.1.1 Starting CMS").	
Password	Up to 5 digits (None)	Specifies the Agent password to be entered when the Agent logs in as the Supervisor. The symbol "*" will appear for each number you enter. <i>You can also log in to the system without specifying the Password.</i>	
Confirm	Up to 5 digits (None)	Is used for confirming the password. The symbol "*" will appear for each number you enter.	
Full Name	Up to 50 characters (None)	Specifies the full name of the Agent.	
Rank	1-9 (1)	Specifies the rank of each Agent based on the individual call handling performance and experience. Used only for your reference.	
Default Ext	All available extensions (None)	Specifies the extension number to which the Agent is logged in unless otherwise specified.	
Default Group	01-16 (None)	Specifies the Agent Group to which the Agent is assigned unless otherwise specified.	
Current Ext	—	Displays the extension number to which the Agent is currently logged in.	
Current Group	—	Displays the Agent Group to which the Agent is currently assigned.	
Comment	Up to 252 characters (None)	Specifies the comments on the Agent.	
Initial Date	—	Displays the date on which the Agent data is registered for the first time.	
Update Date	—	Displays the date on which the existing data has been changed the last time.	
Image	—	Specifies the image file of the Agent (BMP/JPG file).	

The items with a check mark (✓) must be specified.

◆ **To register a new Agent:**

1. Specify the setting.
2. Do as follows:
 - To specify the image file of the Agent:
 - 1) Click **Image**.



- 2) Specify the image file (BMP or JPG file) and click **Open**. The selected image will be displayed in **Image**.

3. Click **Add**. The data will be added to the Agent Database.

The maximum number of Agents that can be registered to the system depends on your connecting PBX (for details, see "1.1.3 System Configuration").

◆ **To modify the existing Agent data:**

1. Open the record of the desired Agent.
2. Modify the desired data and click **Update**.
While the selected Agent is logged in, you cannot modify the data.

◆ **To delete the existing Agent data:**

1. Open the record of the desired Agent.
2. Click **Delete**.
While the selected Agent is logged in, you cannot delete the data.

3.3 Registering a Customer

3.3.1 Setting Customer Information

This section describes how to enter new customer data in the Customer Database. You can easily search the Database for the desired record by Customer Name, Customer ID, or Telephone number to modify or delete the existing data. Use the Customer Database to gather call information and reflect it on the Caller Information screen (for details, see "4.1.7 Caller Information Screen").

From the menu bar, choose **Functions** → **Customer Manager**. Click **Properties** in the Customer Manager screen.

Descriptions of each field:

Items below can be exported/imported in a CSV format file (for details, see "4.2.1 Confirming Call Log").

Field	Parameter (Default)	Description	Input Required
Customer Name	Up to 50 characters (None)	Specifies name of the customer.	✓
Customer ID	Up to 9 digits (None)	Specifies the ID of the customer.	✓
Tel	Up to 30 digits (None)	Specifies telephone number of the customer.	✓

Field	Parameter (Default)	Description	Input Required
Fax	Up to 30 digits (None)	Specifies the fax number of the customer.	✓
Rank	1-9 (1)	Specifies the rank (9 to 1, from the highest to the lowest) of the customer according to the customer's importance. Used only for your reference.	
Address	Up to 250 characters (None)	Specifies the address of the customer.	✓
Comments	Up to 128 characters (none)	Specifies the comments on the customer.	
Initial Date	—	Displays the date on which the customer data is added for the first time.	
Update Date	—	Displays the date on which the customer data is updated the last time.	

The items with a check mark (✓) must be specified.

◆ **To register a customer data:**

1. Specify the setting.
2. Click **Add**. The customer data will be added to the Customer Database.
3. Do one of the following:
 - To register another customer data, repeat steps 1 through 3.
 - To finish registering, click **Close**. The customer data will be updated and the Customer Properties screen closes.

◆ To search the Database:

1. Do one of the following:
 - a) To search by name, enter the desired name in **Customer Name**.
You can also search by entering first one or few digits of the desired name.
 - b) To search by ID, do one of the following:
 - Specify a specific ID in **Customer ID** to search for one customer.
 - Specify a range in **Customer ID** to search for the customers whose IDs are within the specified range. To specify a range, enter two IDs that begins and ends the range with a hyphen (-) in between.
For example, to search for the customers whose IDs are within the range from 50 to 999, enter: 50-999.
 - c) To search by telephone number, enter the desired telephone number in **Tel**.
You can also search by entering first one or few digits of the desired telephone number.
2. Click **Go!**.
The matching record will be shown on the screen.

◆ To modify customer data:

1. Enter the **Customer Name**, **Customer ID** or **Tel** of the desired customer in the appropriate fields, and click **Go!**.
The matching record will be shown on the screen.
2. Enter new information, and click **Update**.

◆ To delete customer data:

1. Specify the data which you want to delete.
2. Click **Delete**. The selected data will be deleted.

◆ To register a new customer information automatically:

Check **Auto Register of Customer Data** in the System screen. the Customer Database will automatically issue a new customer ID and register in to the database as well as the customer name and telephone number (see "3.1.1 Setting System Parameters" to use this function).

3.4 Setting Options

3.4.1 Setting Feature Codes

The Code Property screen shows System Codes that the Agents or Supervisor enter from their telephones during operation. (For detailed instructions about how to use the telephone, see "6.2.1 Quick Reference Guide".)

From the menu bar, choose **Tools** → **Option**. Click the **Code** tab.

Descriptions of each field:

You cannot change the System Codes; you can only specify the Result Codes and Descriptions.

Field	Parameter (Default)	Description
Login	10	Used to log in to the default Agent Group.
Logout	11	Used to log out from the default Agent Group.
Group Login	12	Used to log in to the specific Agent Group.
Group Logout	13	Used to log out from the specific Agent Group.
Agent Break	20	Used to enter Break mode. While in Break mode, the Agent can refuse all incoming calls. <i>The time during which an Agent is in Break mode will be included in the log-in time.</i>

Field	Parameter (Default)	Description
Agent Active	21	Used to leave Break mode. The Agent can accept incoming calls again.
Result Code 1-10	50-99 (None)	Specifies the code that the Agents enter from the telephone to store call results after each conversation. Entering a specific Result Code will output its corresponding Description to the Call Log Manager screen (see "4.2.1 Confirming Call Log" for more information). <i>Wrap-up Time will automatically finish after entering the Result Code</i> (see "3.2.1 Configuring an Agent Group").
Description 1-10	Up to 8 characters (None)	Specifies the Description for the corresponding Result Code ; Description will be output to the Call Log Manager screen (see "4.2.1 Confirming Call Log" for more information).

◆ **To configure the Result Codes:**

1. Specify the setting.
2. Do one of the following:
 - Click **Apply** to update the data.
 - Click **OK** to update the data and close the Option screen.
 - Click **Cancel** to cancel the change that you have made and close the Option screen.

3.4.2 Customising the Display

This section describes how to customise the display format of the Main screen. You can specify the display size (in Large or Small) for each call counter (Incoming Calls, Answered Calls, Waiting Calls, Lost Calls, Average Wait Time, Longest Wait Time, Average Talk Time, Non ACD Calls and Abnormal Calls). You can also assign a threshold value for each counter.

From the menu bar, choose **Tools** → **Option**. Click the **Screen Layout** tab.

Descriptions of each field:

Field	Parameter (Default)	Description
Threshold	Up to 5 digits (50)	Specifies the threshold number for each counter (in number of calls for call counters; in seconds for time counters). <i>If the accumulated value (i.e., the number of calls or the length of time) exceeds the specified threshold, the background colour of the counter changes into red.</i>
Large Disp	All counters (Incoming Calls, Answered Calls, Waiting Calls, and Lost Calls)	Specifies the counter to be displayed in the large size on the Main screen. <i>Exactly 4 counters are always displayed in the large size.</i>

Field	Parameter (Default)	Description
Small Disp	All counters (Average Wait Time, Longest Wait Time, Average Talk Time, Non ACD Calls and Abnormal Calls)	Specifies the counter to be displayed in the small size on the Main screen. <i>Exactly 5 counters are always displayed in the small size.</i>
Title	Up to 20 characters (Name of the corresponding counter)	Specifies the title of each counter when displayed on the Main screen. By default, the title reflects the name of the counter.

◆ **To set the display format:**

1. Specify the setting.
2. Do one of the following:
 - Click **Apply** to update the data.
 - Click **OK** to update the data and close the Option screen.
 - Click **Cancel** to cancel the change that you have made and close the Option screen.

3.4.3 Setting Log Form

This section describes how to set Call Log Report format. You can choose items to be output to the paper, as well as change the column widths by specifying the maximum number of letters per line to fit the size of the paper to be used. It is also possible to set the print direction to portrait or landscape (for printing out a report, see "4.2.1 Confirming Call Log").

From the menu bar, choose **Tools** → **Option**. Click the **Log Print Format** tab.

Print	Column	Print	Column
1. <input checked="" type="checkbox"/> Date/Time	21	8. <input checked="" type="checkbox"/> CLIP/CID	10
2. <input checked="" type="checkbox"/> Status	8	9. <input checked="" type="checkbox"/> DDI/DID	10
3. <input checked="" type="checkbox"/> Agent	10	10. <input type="checkbox"/> Ring	8
4. <input checked="" type="checkbox"/> Group	7	11. <input type="checkbox"/> Wait	8
5. <input type="checkbox"/> Ext No	10	12. <input checked="" type="checkbox"/> Talk	8
6. <input checked="" type="checkbox"/> Customer	15	13. <input type="checkbox"/> Hold	8
7. <input type="checkbox"/> Customer ID	8	14. <input checked="" type="checkbox"/> Result	6

Print Direction:
☐ Portrait
☒ Landscape

OK Apply Cancel

Descriptions of each field:

Field	Parameter (Default)	Description
Print check box	None	Specifies the items to be output to the paper. For details about each item, see "4.2.1 Confirming Call Log".
Column	1-99 (—)	Specifies the column width by specifying the maximum number of letter per line (for detailed information on each item, see "4.2.1 Confirming Call Log"). <i>For parameter of each column, see the display example above.</i>
Print Direction	Portrait/Landscape (Portrait)	Specifies the print direction.

◆ ***To set the Call Log Report format:***

1. Specify the setting.
2. Do one of the following:
 - Click **Apply** to update the data.
 - Click **OK** to update the data and close the Option screen.
 - Click **Cancel** to cancel the change that you have made and close the Option screen.

Section 4

CMS Operation

4.1 Managing CMS

4.1.1 Managing the Agents

You can have a specific Agent log in to or log out from a specific Agent Group by using the Agent Manager screen.

Before controlling Agent Manager screen, you need to log in to the system. For details, see "2.1.1 Starting CMS".

From the menu bar, choose **Functions** → **Agent Manager**. There are two display formats: List and Icon (to change display format, see "3.1.1 Setting System Parameters").

Agent Manager Mode: List

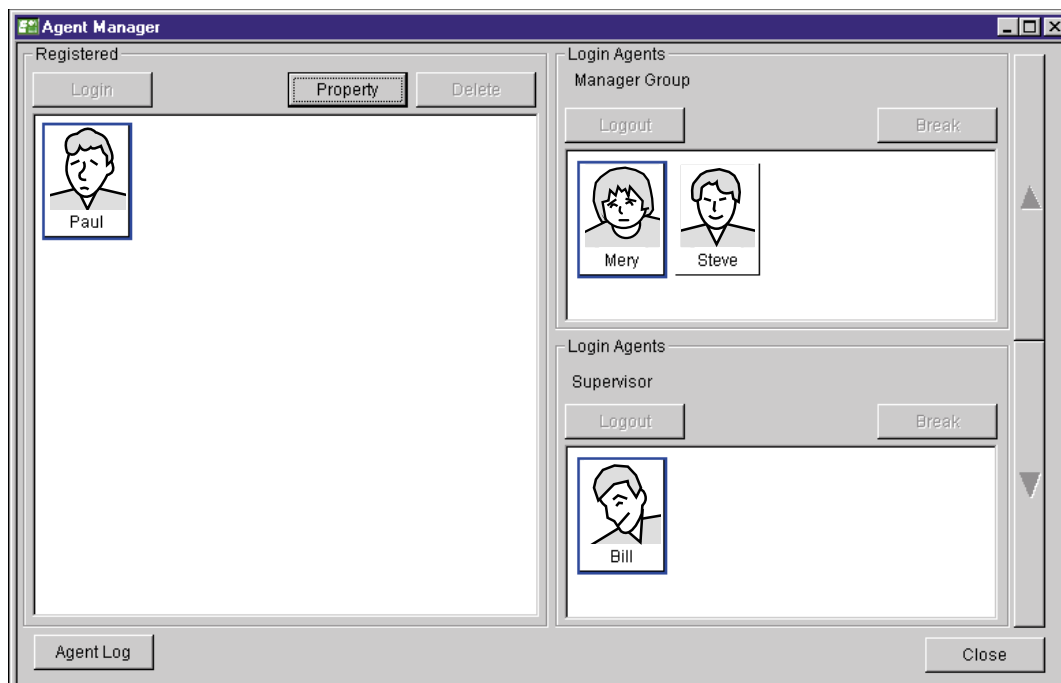
The screenshot shows the 'Agent Manager' window with the following data:

Registered Agent	Default Ext	Default Group
Paul	103	Manager Group

Agent	Current Ext	Status
Mery	101	Break
Steve	109	Active

Agent	Current Ext	Status
Bill	102	Active

Agent Manager Mode: Icon

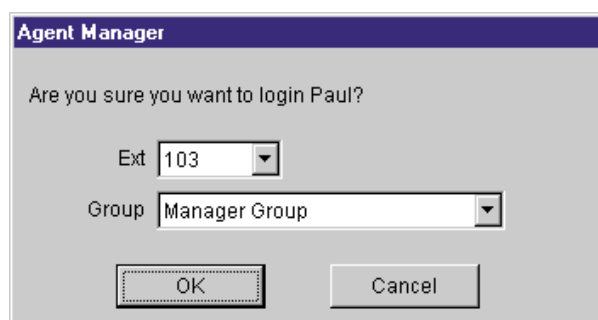


Descriptions of each window:

Window	Description
Registered	Displays the Agents who are logged-out at the moment (along with their extension numbers and names of their default Agent Groups).
Login Agents	Displays the Agents who are currently logged in (along with their extension numbers and status).

◆ To have an Agent log in to a specific Agent Group:

1. Select an Agent whom you want to log in from the Registered window.
2. Click **Login**. The following dialogue box appears with the extension number and Group name of the selected Agent's default Agent Group.



3. Do one of the following:

- To have the Agent log in to the default Agent Group:
Click **OK**. The Agent will log in to the default extension and Agent Group.
- To have the Agent log in to a non-default Agent Group (e.g., to assign an Agent to a short-handed section temporarily):

1) Select the desired extension number in **Ext** and Agent Group in **Group**.

You must select an idle extension within the Agent Group. If the extension number has already been used, an error message dialogue box appears.

2) Click **OK**. The Agent will log in to the specified extension and Agent Group.

The selected Agent will move from the Registered window to the appropriate Login Agents window.

Notes

- One Agent cannot log in to more than one Agent Group.
- After you have had the Agent logged in to the system, Agent screen for the corresponding Agent starts monitoring a real-time call handling status (for details, see "4.1.6 Agent Screen").
- Although you can have the same Agent login/logout as many time as you want, the Agent screen is initialised each time you have the Agent logout from the system; logs that have been recorded will not be initialised (for details, see "4.2.1 Confirming Call Log").
- The maximum number of Agents to be logged in to the system at the same time depends on your connecting PBX (see "1.1.3 System Configuration").

◆ ***To have an Agent log out from a specific Agent Group:***

1. Select an Agent whom you want to log out from the Login Agents window.

2. Click **Logout**. A confirmation dialogue box appears.

3. Click **OK**.

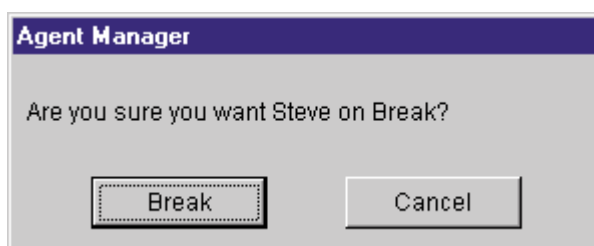
The selected Agent will move from the Login Agents window to the Registered window.

◆ **To have an Agent enter Break mode:**

You can have the desired Agent enter Break mode to reject incoming calls (e.g., when Agents leave their desks for a short period); Agents are still logged in to CMS while in Break mode.

The time during which the Agents are in Break mode will be counted as the Login Duration on the corresponding reports (for details, see "5.1.1 Report Type").

1. Select the Agent to put on Break mode from the Login Agents window.
2. Click **Break** in the Login Agents window.

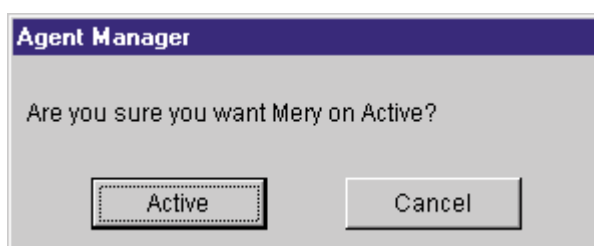


3. Click **Break**. The icon for the selected Agent will change accordingly in the tree view window of the ACD Manager screen (for details, see "4.1.2 Monitoring the Call Centre Status").

◆ **To release an Agent from Break mode:**

The Agent can accept incoming calls again.

1. Select an Agent in Break mode from the Login Agents window.
2. Click **Break** in the Login Agents window.



3. Click **Active**. The icon for the selected Agent will change in the tree view window of the ACD Manager screen (for details, see "4.1.2 Monitoring the Call Centre Status").

Note

Agents can individually enter or leave Break mode by entering the corresponding System Codes from PTs (for detailed instructions, see "6.2.1 Quick Reference Guide").

◆ **To view and/or modify the existing Agent data:**

1. Select the desired Agent and click **Properties**.
The Agent Properties screen appears with the registered information (see "3.2.3 Registering an Agent" for detailed information).
2. If desired, modify the desired data and click **Update**.
While the selected Agent is logged in, you cannot modify the data.

◆ **To delete the existing Agent data:**

1. In the Agent Manager screen, select the desired Agent.
2. Click **Delete**. The selected Agent will be deleted.
While the selected Agent is logged in, you cannot delete the data.

◆ **To obtain login/logout history of an Agent:**

Select the desired Agent and click **Agent Log**.
The Agent Log screen appears with the login/logout information (see "4.2.2 Confirming Agent's Login/Logout History" for detailed information).

4.1.2 Monitoring the Call Centre Status

CMS provides various screens to allow real-time monitoring of the operating status of the call centre precisely. By analysing counters that will display on the screens lively, you can make decisions such as re-assignments of the Agents to even out workloads among the Agent Groups to achieve the optimum call centre performance.

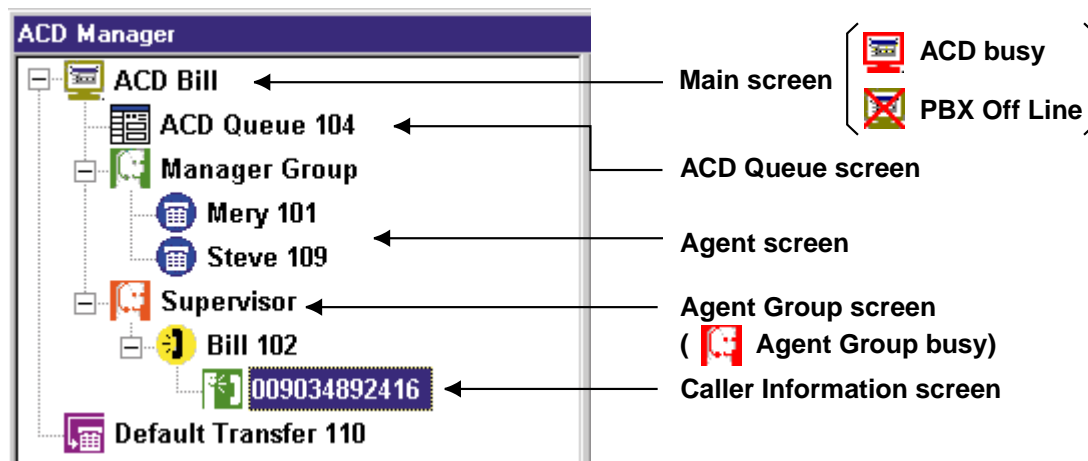
Information of each screen is displayed in the table below:

Screen	Description
Main screen	Provides real-time monitoring of calls being handled by CMS. For details, see "4.1.3 Main Screen".
ACD Queue screen	Provides real-time monitoring of calls currently waiting in the ACD Queue. For details, see "4.1.4 ACD Queue Screen".
Agent Group screen	Provides real-time monitoring of performance of Agent Groups. For details, see "4.1.5 Agent Group Screen".
Agent screen	Provides real-time monitoring of performance of Agents. For details, see "4.1.6 Agent Screen".
Caller Information screen	Provides detailed information of a specific caller. For details, see "4.1.7 Caller Information Screen".

◆ Tree View Icons:

Icons on the tree view window provide you with an easy understanding of the real-time call handling status in the system. You can also view the desired displays by clicking corresponding icons other than the Default Transfer icon; this only shows the current default transfer extension number.











Click to open:



Note

Agent and Caller icons will change depending on the corresponding Agent/Caller status. See the details below.


Descriptions of each icon:

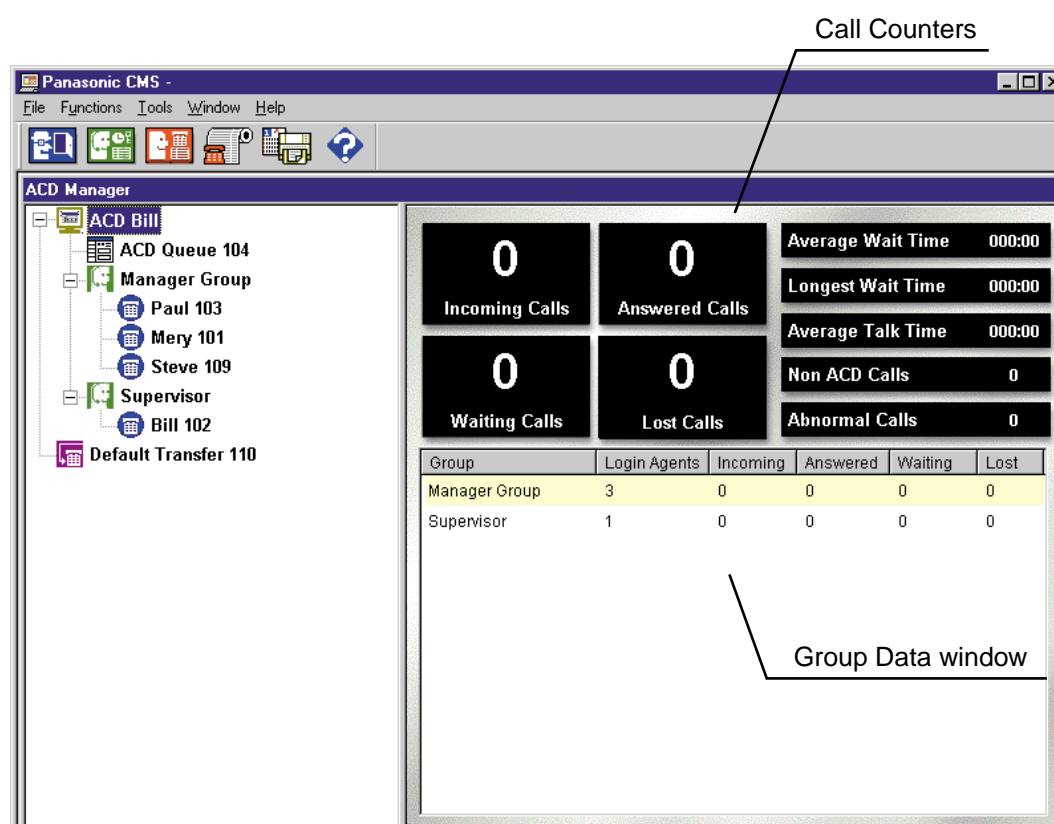
Agent Icons		Caller Icons	
 : Idle	 : Wrap Up	 : Offering	 : Hold
 : Busy	 : Break	 : Conference	 : Talk
		 : Off Hook	 : On Hook

4.1.3 Main Screen

The Main screen allows you to monitor both current and statistical data of the calls handled by CMS, as well as the information on performance of each Agent Group. It provides an at-a-glance understanding of current call centre operation status. Depending on the traffic of calls, you can increase/decrease the number of Agents assigned to a specific Agent Group (for instructions, see "4.1.1 Managing the Agents").

◆◆ To view the Main screen

Click  on the tree view window.



Call Counters

The Call Counters provide the statistics of various important parameters relating to the general performance of the call centre that have been accumulated since the beginning of the operation. Close analysis of these counters help you achieve the optimum performance of the call centre.

Optionally, you can set the counters to give you alarm signs (e.g., when too many calls have been lost) by assigning certain **Threshold Time** to them. In addition, it is also possible to change their positions. For more information, see "3.4.2 Customising the Display".

The counters will be initialised once every day as scheduled by ACD Reset Time (see, "3.1.1 Setting System Parameters").

Counter	Description
Incoming Calls	Indicates the total number of incoming calls that have been handled in CMS.
Answered Calls	Indicates the total number of calls (including calls on hold) currently being answered by Agents.
Waiting Calls	Indicates the total number of calls currently waiting in the ACD Queue.
Lost Calls	Indicates the total number of calls disconnected without having been answered.
Average Wait Time	Indicates the average length of time in the latest one hour that the calls are being left in the ACD Queue. Updates each time a call leaves the ACD Queue.
Longest Wait Time	Indicates the longest length of time since you started CMS that a call was left unanswered in the ACD Queue.
Average Talk Time	Indicates the average length of time the calls are being in conversation with an Agent. Updates each time a conversation finishes.
Non ACD Calls	Indicates the total number of calls that have been forwarded to CMS via extensions assigned to the Non ACD Call Transfer.
Abnormal Calls	Indicates the total number of calls been lost within the Abnormal Call Threshold Time specified in the System screen (for details, see "3.1.1 Setting System Parameters").

Group Data window

The Group Data window provides real-time monitoring of overall performance of each Agent Group. By analysing the information given in this window, you can compare the workloads among the Agent Groups. If the workloads are not been equally distributed, you can re-assign the Agents (see "4.1.1 Managing the Agents") among the Agent Groups to improve the call centre performance.


Column	Description
Group	Displays the names of the Agent Groups.
Login Agents	Displays the number of Agents currently logging-in to each Agent Group.
Incoming	Displays the total number of calls been distributed to each Agent Group.
Answered	Displays the total number of calls each Agent Group has answered.
Waiting	Displays the number of calls currently being left in the ACD Queue for each Agent Group.
Lost	Displays the total number of calls that have been disconnected without having been answered for each Agent Group.

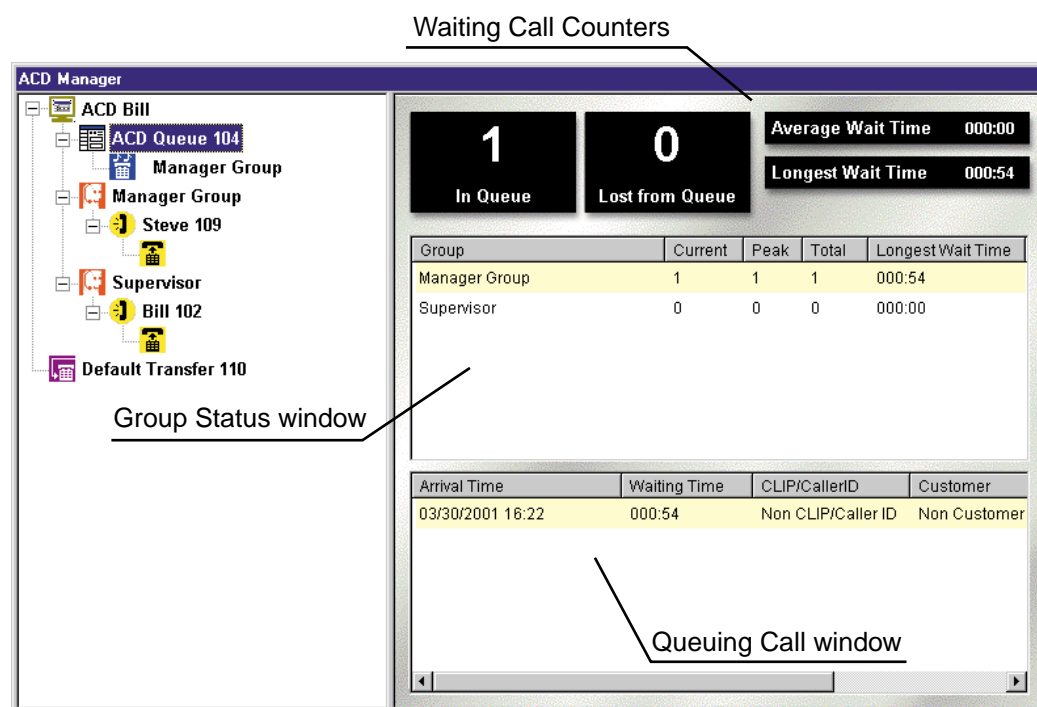
To sort the records, click the column header.

4.1.4 ACD Queue Screen

The ACD Queue screen allows you to monitor both current and statistical data of the calls been held in the ACD Queue, as well as detailed information on queuing status for each Agent Group. The information given in this screen will help you shorten the average waiting time (and in effect, reduce the number of lost calls) by controlling the number of Agents for each Agent Group.

◆◆ To view the ACD Queue screen

Click  on the tree view window.



Waiting Call Counters

The Waiting Call Counters provide the statistics of the parameters relating to the calls been held in the ACD Queue that have been accumulated since the beginning of the operation. **The counters will be initialised once every day as scheduled by ACD Reset Time** (see "3.1.1 Setting System Parameters").

Counter	Description
Average Wait Time	Indicates the average length of time the calls are currently being left in the ACD Queue. Updates each time a call leaves the ACD Queue.
Longest Wait Time	Indicates the longest length of time a call is currently being left in the ACD Queue.
In Queue	Indicates the total number of calls currently being left in the ACD Queue.

Counter	Description
Lost from Queue	Indicates the total number of calls that have been disconnected without being answered since you started CMS.

Group Status window

The Group Status window provides collective information for calls that have entered the ACD Queue for each Agent Group. By comparing the traffic of calls among the Agent Groups, you can decide whether to increase/decrease the number of Agents assigned to a specific Agent Group (for instructions, see "4.1.1 Managing the Agents").

Column	Description
Group	Displays the name of each Agent Group.
Current	Displays the total number of calls currently being left in the ACD Queue.
Peak*	Displays the maximum number of calls the ACD Queue has held at the same time since the beginning of the operation for each Agent Group.
Total*	Displays the average number of calls that have been left in the ACD Queue at the same time in the latest one hour for each Agent Group.
Longest Wait Time*	Displays the longest waiting time of the call been left in the ACD Queue since the beginning of the operation for each Agent Group.

* The data will be initialised once every day as scheduled by ACD Reset Time (see, "3.1.1 Setting System Parameters").

Queuing Call window

The Queuing Call window provides general information on calls currently being left in the ACD Queue. It helps you identify the caller before answering the call.


Column	Description
Arrival Time	Displays the time at which each call arrived in CMS (i.e., in the ACD Queue).
Waiting Time	Displays the length of time during which each call is currently being left in the ACD Queue.
CLIP/CallerID	Displays the telephone number of the caller (if registered).
Customer	Displays the name of the customer (if registered).
Group	Displays the name of the Agent Group to which the call will be forwarded.

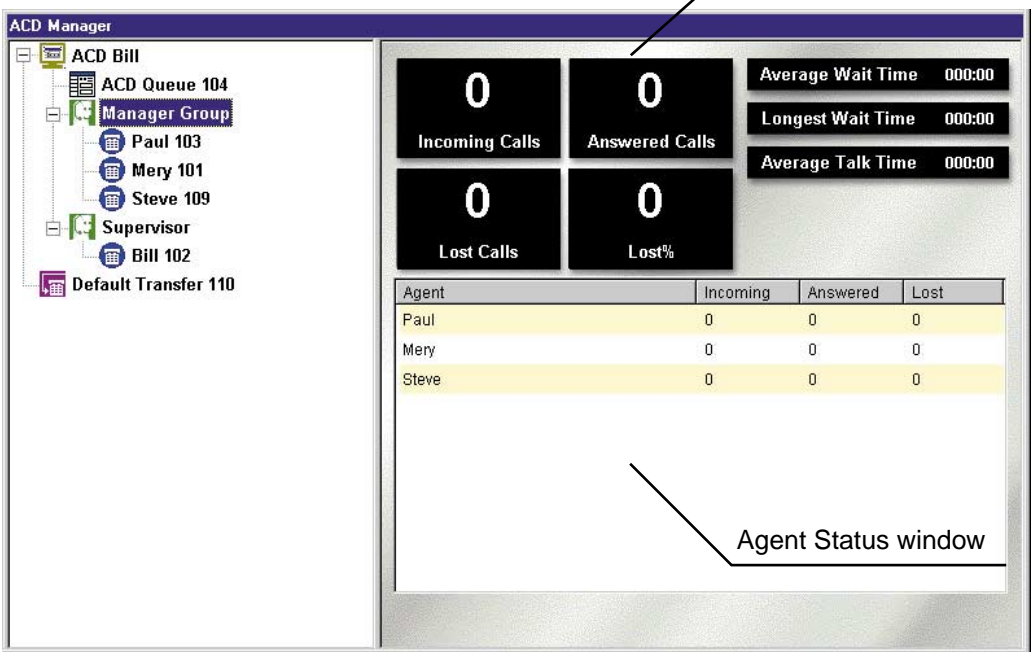
To sort the records, click the column header.

4.1.5 Agent Group Screen

The Agent Group screen allows you to monitor both current and statistical data of the calls been handled by a specific Agent Group, as well as the information on performance of each Agent assigned to the Agent Group. It provides an at-a-glance understanding of current Agent Group operation status.

◆◆ To view the Agent Group screen

Click  on the tree view window.



Call Counters (Group)

Agent	Incoming	Answered	Lost
Paul	0	0	0
Mery	0	0	0
Steve	0	0	0

Agent Status window

Call Counters (Group)

The Call Counters provide the statistics of various important parameters relating to the general performance of a specific Agent Group that have been accumulated since the beginning of the operation. Close analysis of these counters help you balance the number of Agents against the workloads of the Agent Group; depending on the traffic of calls, you can increase/decrease the number of Agents assigned to a specific Agent Group (for instructions, see "4.1.1 Managing the Agents").

The counters will be initialised once every day as scheduled by ACD Reset Time (see "3.1.1 Setting System Parameters").

Counters	Description
Incoming Calls	Indicates the total number of incoming calls that have entered the Agent Group.
Answered Calls	Displays the total number of calls (including calls on hold) that have been/are currently being answered by Agents.
Lost Calls	Displays the total number of calls disconnected without having been answered.
Lost %	Displays the percentage of lost calls to the total number of calls that have been distributed to the Agent Group.
Average Wait Time	Indicates the average length of time the calls are currently being left in the ACD Queue for the Agent Group. Updates each time a call leaves the ACD Queue.
Longest Wait Time	Indicates the longest length of time a call is currently being left in the ACD Queue for the Agent Group.
Average Talk Time	Indicates the average length of time that calls are currently being in conversation with each Agent Group. Updates each time a conversation finishes.

Agent Status window

The Agent Status window provides real-time monitoring of overall performance of each Agent assigned to a specific Agent Group. By analysing the information given in this window, you can compare the performance among the Agents.

Column	Description
Agent	Displays the names of the Agents that are currently logging in to the Agent Group.
Incoming*	Displays the total number of calls been distributed to each Agent.
Answered*	Displays the total number of calls each Agent has answered.
Lost*	Displays the number of calls that were disconnected without being answered by each Agent.

* The data will be initialised once every day as scheduled by ACD Reset Time (see "3.1.1 Setting System Parameters").

To sort the records, click the column header.


4.1.6 Agent Screen

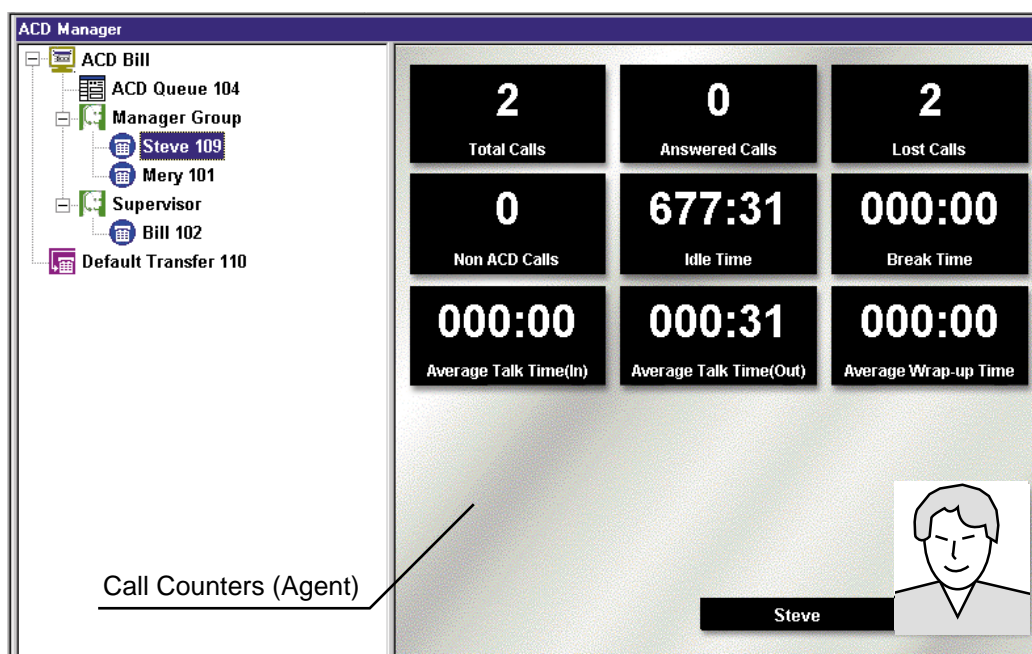
The Agent screen allows you to monitor statistical data of the calls been handled by a specific Agent. It provides an at-a-glance understanding of current Agent operation status.

While logged-in, the Agent is in one of the following status:

- **Idle**
The Agent is ready to receive calls.
- **Busy**
The Agent is in conversation or being put on hold.
- **Wrap-up**
The Agent has just finished a call and is in Wrap-up Time; calls are not distributed to the Agent. To specify the length of the **Wrap-up Time**, see "3.2.1 Configuring an Agent Group".
- **Break**
The Agent is in Break mode; calls are not distributed to the Agent. To release the Agent from Break mode, see "4.1.1 Managing the Agents".

◆◆ To view the Agent screen

Click  on the tree view window.



Call Counters (Agent)

The Call Counters provide the statistics of various important parameters relating to the general performance of a specific Agent that have been accumulated since the beginning of the operation. By analysing the information given on this screen, you can evaluate skills and productivity of each Agent.

The counters will be initialised once every day as scheduled by ACD Reset Time (see, "3.1.1 Setting System Parameters").

Counter	Description
Total Calls	Indicates the total number of calls that have been distributed to the Agent.
Answered Calls	Indicates the total number of calls (including calls on hold) that the Agent has answered.
Lost Calls	Indicates the total number of calls that were disconnected without being answered.
Non ACD Calls	Indicates the total number of calls that have been forwarded to CMS via extensions assigned to the Non ACD Call Transfer.
Idle Time	Indicates the total length of time the Agent has been idle. The value increases when there is no calls connected or in conference with the Agent.
Average Talk Time (In)	Indicates the average length of conversations of the Agent when receiving incoming calls. Updates each time an incoming call finishes.
Average Talk Time (Out)	Indicates the average length of conversations of the Agent when making outgoing calls. Updates each time an outgoing call finishes.
Average Wrap-up Time	Indicates the average length of time the Agent is in wrap-up status. Updates each time the wrap-up time finishes.
Break Time	Indicates the total time during which the Agent is in Break mode.

4.1.7 Caller Information Screen

The Caller Information screen allows you to monitor detailed information of a caller before and during a conversation. From the information given in this screen, you can identify the customer as well as know the customer-specific information such as the **Comments** and **Rank**. Moreover, you may be able to predict the customer's needs without actually having been told. To view the caller information, the caller must be registered in the Customer Database (for more information, see "3.3.1 Setting Customer Information").

◆◆ To view the Caller Information screen

When an incoming call arrives at the Agent, click  on the tree view window.



Name	Lisa Enfield
Tel	009034892416
Customer ID	11435
Rank	1
Comments	Marked the best customer
Address1	824 Elton Bury UK
Talk Time	000:46
Wait Time	000:07

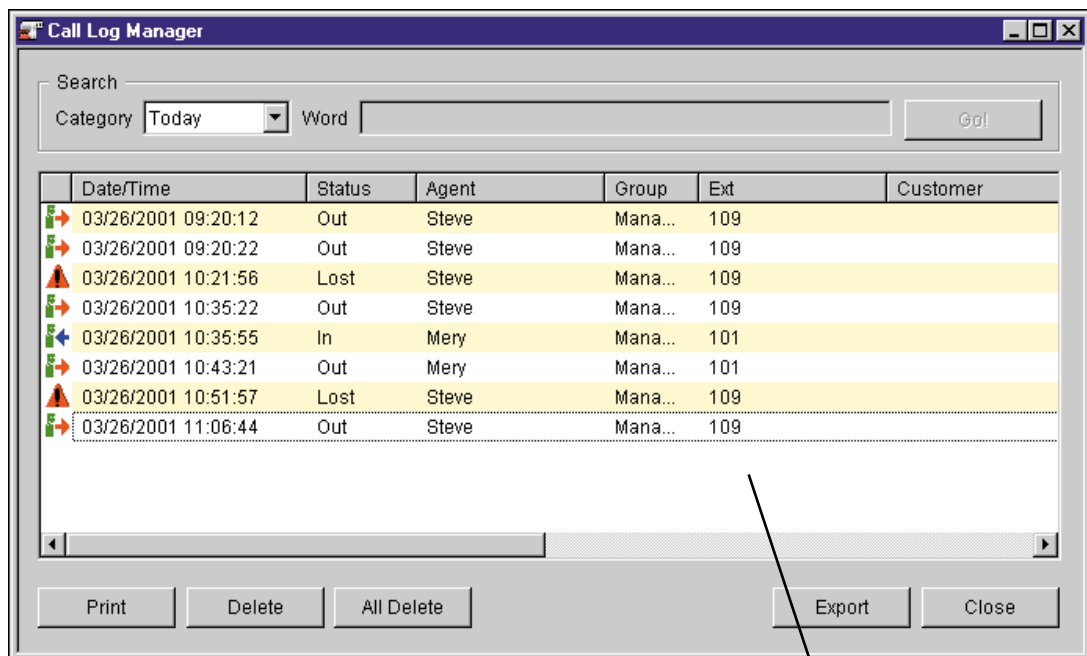
Field	Description
Name	Displays the name of the customer.
Tel	Displays the telephone number of the customer.
Customer ID	Displays the ID of the customer.
Rank	Displays the rank of the customer.
Comments	Displays the comment for the customer.
Address	Displays the address of the customer.
Talk Time	Displays the total length of time during which the customer is currently being in conversation with an Agent.
Wait Time	Displays the total length of time during which the customer is currently waiting in the ACD Queue.

4.2 Confirmation

4.2.1 Confirming Call Log

The Call Log Manager screen displays the historical data stored in the Log Database. Using the Call Log Manager screen, you can monitor, search, delete or print out the desired log information. It is also possible to export the desired log information to a CSV format file. By default, the Call Log Manager screen opens with the information for the current day.

From the menu bar, choose **Functions** → **Call Log Manager**.



Log List window

Log List window

The Log List window provides the detailed log information.

To display the log information specifically for the Supervisor, select Supervisor from the pull-down menu of the Category field.

Descriptions of each column:

Column	Description
Date/Time	Displays the date and time on which calls are distributed to CMS.
Status	Indicates the status of each call handled in CMS.
Agent	Indicates the name of the Agent to whom the call is lastly connected or distributed.
Group	Indicates the name of the Agent Group to which a call is lastly distributed.

Column	Description
Ext	Indicates the number of the Agent's extension to which a call is connected or distributed.
Customer	Displays the name of the customer if a matching caller's information (CLIP/CallerID*) is found in the Customer Database. When no matching information is found, nothing will be displayed.
ID	Displays the Customer ID registered in the Customer Properties screen.
CLIP/CLI	Displays the customer telephone number if a matching caller's information (CLIP/CallerID) is found in the Customer Database. When no matching information is found, nothing will be displayed.
DID/DDI	Displays the DDI/DID number for the calls to which DDI/DID numbers are assigned. For details about DDI/DID, see "3.1.3 Setting DDI (Direct Dialling In)/DID (Direct Inward Dialling) Number".
Ring	Displays the number of times the Agent extension has rang while the call has been left unanswered.
Wait	Displays the length of time during which a call has been held in the ACD Queue.
Talk	Displays the length of conversation.
Hold	Displays the total time during which a call is being placed on hold.
Result	Displays the matching Description for the Result Code entered by the Agent after the call.

* Shows the calling party's number on the display of the called party's telephone when a call is received.

To sort the records, click the column header.

To set call log report format, see "3.4.3 Setting Log Form".

◆ To search the log:

1. Select the desired item from **Category**.
All items in the Log List window will be shown in the pull-down list of menus.
2. Specify the search span or keyword:
 - If you have selected **Date/Time** in the Step 1, the Search Span screen appears.

Specify the search span as below and click **OK**. The specified search span will be displayed in **Word** automatically.

- 1) For "From", specify the date and time from which to begin the search:
Choose the year (**1970-2038**) and month (**1-12**), click the desired **date** in the calendar, and specify the start time (**00:00-23:59**).
- 2) For "To", specify the date and time on which to end the search:
Choose the year (**1970-2038**) and month (**1-12**), click the desired **date** in the calendar, and specify the end time (**00:00-23:59**).

The date and time specified for "To" must always postdate the date and time specified for "From"; if "To" predates "From", an error message will appear when you click OK.

- If you have selected **Ring**, **Talk** or **Hold** in the Step 1, the Search Time screen appears.

Specify the search range as below and click **OK**. The specified search range will be displayed in **Word** automatically.

- 1) In the left side of the window, specify the start point of the search range in minutes and seconds (**000:00 to 999:59**).
- 2) In the right side of the window, specify the end point of the search range in minutes and seconds (**000:00 to 999:59**).

For example, to search the log information for calls whose Talk or Hold time was from 30 seconds to 2 minutes, specify: 0:30-2:00.

- If you have selected the items other than **Date/Time**, **Talk** or **Hold** in the Step 1, enter the keyword in **Word**.

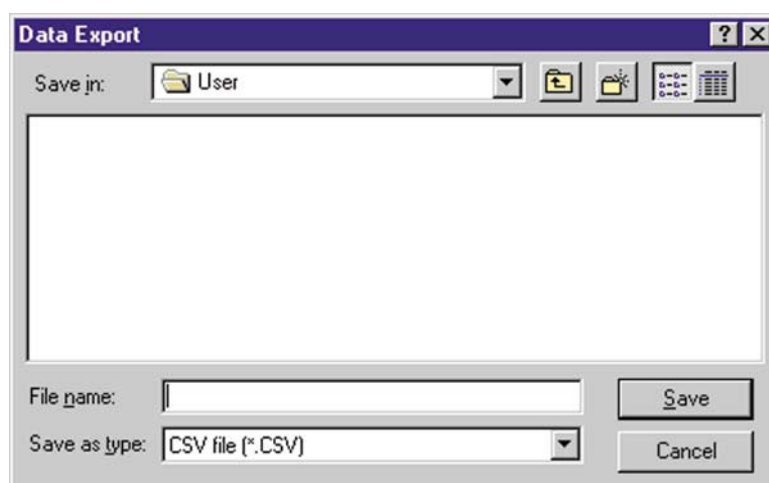
3. Click **Go!**. The search result will be displayed.

◆ **To print out or delete the log information:**

1. Select the desired log information.
2. Do one of the following:
 - Click **Print** to print out the log.
 - Click **Delete** to delete the log. To delete all logs, click **All Delete**.
3. Do one of the following after the confirmation dialogue box appears:
 - Click **All** to print out or delete all logs.
 - Click **Select** to print out or delete the selected log.
 - Click **Cancel** to cancel.

◆ **To export the data:**

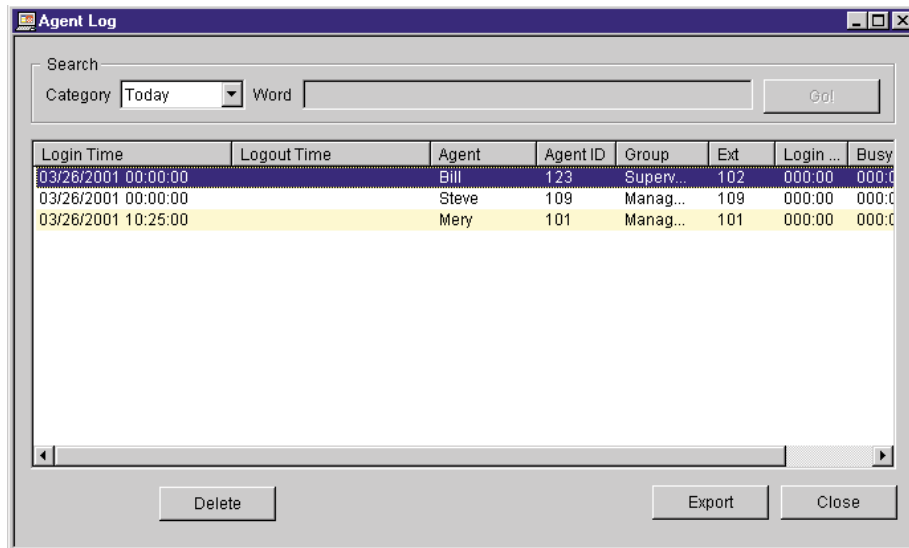
1. Select the desired data and click **Export**.
2. Specify the folder in which you want to save the file. Click **Save** after entering the file name. Click **OK** to the confirmation message box.
For details about items available to export, see "Log List window" in "4.2.1 Confirming Call Log".



4.2.2 Confirming Agent's Login/Logout History

You can open the Agent Log screen from the Agent Manager to obtain login/logout history of a specific Agent (to open the Agent Manager, see "4.1.1 Managing the Agents"). The Agent Log screen will help you analyse the performance of the desired Agent. It is also possible to export the data in a CSV format file.

In the Agent Manager screen, select the desired Agent and click **Agent Log**.



Descriptions of each column:

Column	Description
Login Time	Displays the time at which the Agent has logged in to the system.
Logout Time	Displays the time at which the Agent has logged out from the system.
Agent	Displays the name of the selected Agent.
Agent ID	Displays the ID of the selected Agent.
Group	Displays the name of the Agent Group to which the Agent is assigned.
Ext	Displays the extension number to which the Agent is assigned.
Login Duration	Displays the length of time during which the Agent has been logged in.
Busy	Displays the length of time during which the Agent has been busy.
Break	Displays the length of time during which the Agent has been in Break mode.

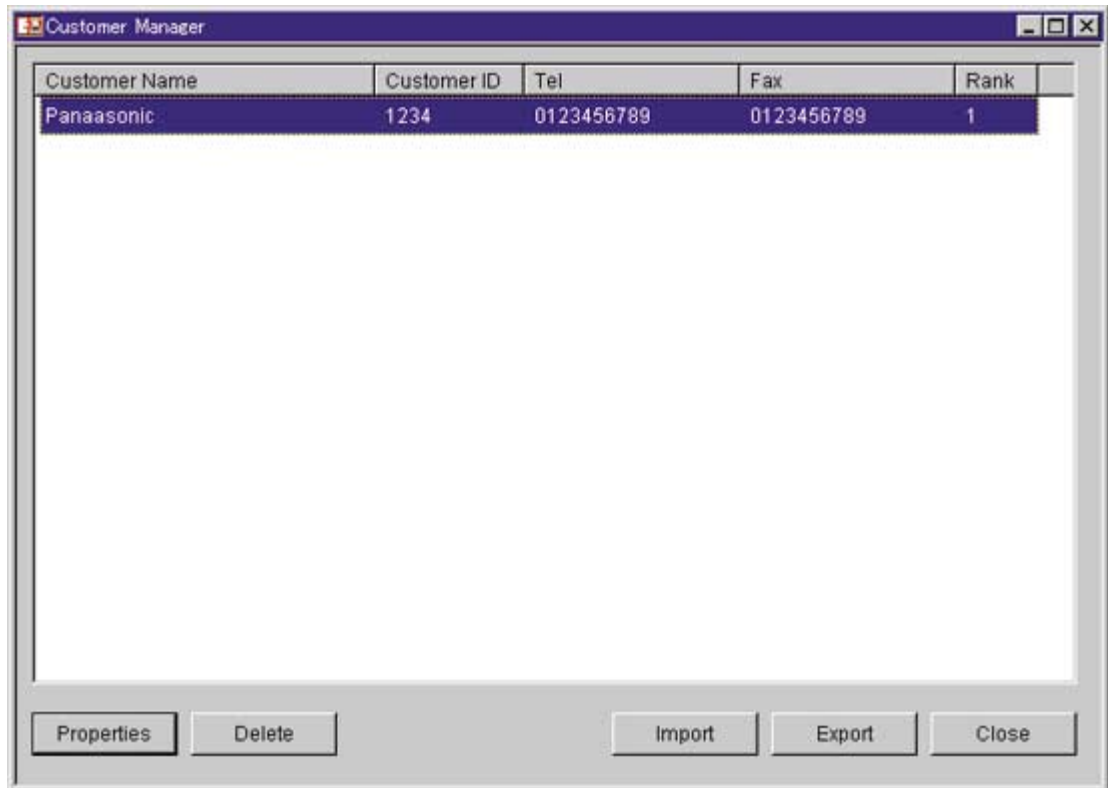
◆ **To collect login/logout data of a specific Agent:**

1. Specify the desired item in the **Category** field.
 - If you have searched **Login/Logout Time**, the Search Time window will appear. Specify the required search range (see "To search the log" in "4.2.1 Confirming Call Log" to set the search time range).
 - If you have selected the items other than **Login/Logout Time**, enter the keyword in the **Word** field.
2. Click **GO!**. The data reflects the category you have specified.
3. Do one of the following:
 - To export the selected Agent's call handling history:
 - 1) Select the desired data and click **Export**.
 - 2) Specify the folder in which you want to save the file. Click **Save** after entering the file name. Click **OK** to the confirmation message box.
For details about items to be exported, see "Descriptions of each column" explained above.
 - To delete the selected Agent's call handling history:
See "To print out or delete the log information" in "4.2.1 Confirming Call Log" for detailed procedure.

4.2.3 Confirming Customer List

Customer Manager screen displays customer information. You can use this screen to import the data into Customer Database or export the customer data to a CSV format file. Easy access to the Customer Properties screen is also provided.

From the menu bar, choose **Functions** → **Customer Manager**.



◆ **To view the customer data registered in the Customer Database:**

1. Select the desired customer line in the Customer List window.
To sort the records, click the column header.
2. Click **Properties** or double-click the line. The Customer Properties screen appears.

◆ **To add a new record to the Customer Database:**

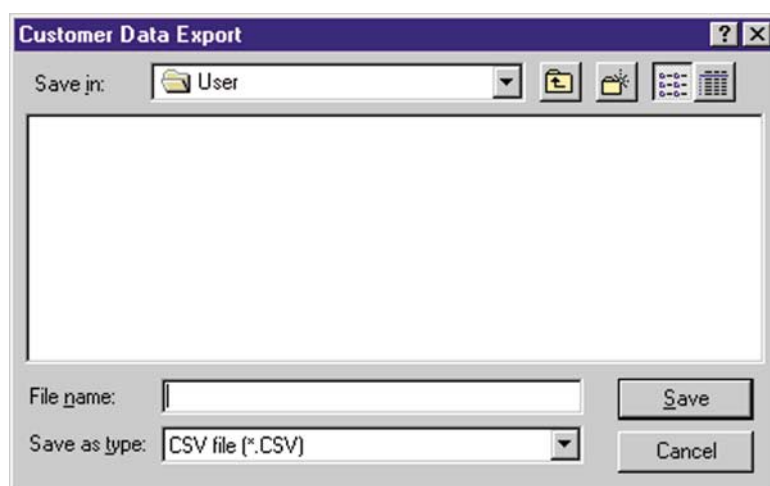
Click **Properties** without specifying a customer line. The Customer Properties screen appears. For detailed instructions for how to register a new record, see "3.3.1 Setting Customer Information".

◆ **To delete the customer data:**

1. Select the data line which you want to delete.
To select several lines at once, hold down the left button of your mouse and drag.
2. Click **Delete**. The selected data will be deleted.

◆ **To export the data:**

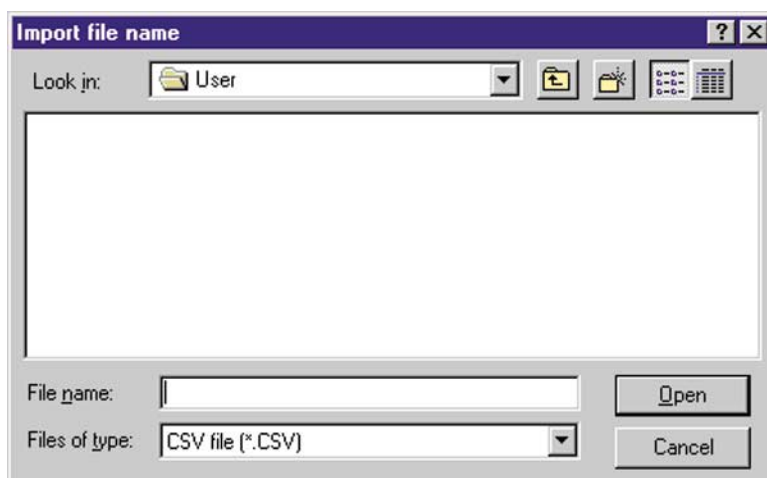
1. Select the desired data and click **Export**.
2. Specify the folder in which you want to save the file. Click **Save** after entering the file name.
Click **OK** to the confirmation message box.
For details about items available to export, see "3.3.1 Setting Customer Information".



If you export a new data, the date on which a new data is first registered will be exported; if there is the same data already been registered, the confirmation message box appears to update the data. If you click OK, the date on which the data is updated will be exported.

◆ **To import the data:**

1. Select the desired data and click **Import**.
2. Select the file in which you want to import the data and click **Open** (selecting the CSV format file that has already been exported is recommended). Click **OK** to the confirmation message box.
For details about items available to import, see "3.3.1 Setting Customer Information".



If you import a new data, the date on which a new data is first registered will be imported; if there is the same data already been registered, the confirmation message box appears to update the data. If you click OK, the date on which the data is updated will be imported.

Section 5

Reports

5.1 Report Type

5.1.1 Report Type

The reporting function of CMS is capable of generating 12 types of reports (for descriptions of each, see below). If desired, you can schedule a number of print jobs for automatic printing on a daily, weekly, and monthly basis. In addition to the automatic printing, it is also possible to manually print out the desired report whenever as required, as well as to export it into a CSV format file. The report saved as a CSV file can then be used for analysing the log information by, for example, making graphs. For instructions, see "5.1.2 Printing Out the Report".

◆◆ Call Log Report

Call Log Report provides all call log information accumulated on the day. With this report, you can analyse the amount of the call traffic depending on the time of the day.

Report Type: Call Log Report

Call Log Report		1/	1				Period 2001/03/19		Printed 2001/03/23 PM12:09:05		12:00:00 - 2001/03/19 11:59:59	
Date/Time	Status	Agent	Group	Customer	CLIP/CID	DDI/DID	Talk	Result				
2001/3/19 AM11:44:56	In	agent 1	Group01			1001	000:12					
2001/3/19 AM11:45:31	In	agent 2	Group01			1001	000:09					
2001/3/19 AM11:46:01	In	Agent 3	Group02	def	1001	1004	000:18					
* 2001/3/19 AM11:47:02	Lost		Group01			1001	000:00					
2001/3/19 AM11:49:25	Out	Agent 3	Group02		1004	565656	000:15					
* 2001/3/19 AM11:50:51	Lost		Group01			1001	000:00					
2001/3/19 AM11:52:21	Abnormal		Group01			1001	000:00					
2001/3/19 AM11:55:42	In	Agent 3	Group02			1001	000:01					
* 2001/3/19 AM11:56:15	Lost		Group02			1001	000:00					
* 2001/3/19 AM11:56:56	Lost		Group02			1001	000:00					
* 2001/3/19 AM10:37:20	Lost	agent 1	#Group01			1001	000:00					
* 2001/3/19 PM01:42:16	Lost	agent 4	#Group01			1001	000:00					

Descriptions of each column:

Item	Description
Date/Time	Shows the date and time at which the conversation was finished or the call was lost.
Status	Shows the status of the call.
Agent	Shows the name of the Agent who answered the call.
Group	Shows the name of the Agent Group to which the Agent was logged in.
Customer	Shows the name of the customer.
CLIP/CID	Shows the telephone number of the caller.
DDI/DID	Shows the DDI number of the caller.
Talk	Shows the duration of conversation.
Result	Shows Description of the corresponding Result Code provided by the Agent.

◆◆ Other Reports

The other 11 reports provide statistical information of calls under various circumstances. The reports are categorised into 4 basic types (Daily, Weekly, Monthly, and Daily [hour]), and each type is further categorised into sub-types. Refer to the table below for the descriptions:

Report Type		Description
Daily	Total	Shows the statistics of all calls that the call centre handled on the day. In addition to the total record for the call centre, the information is also given by Agent Group basis.
	Group	Shows the statistics of all calls that a specific Agent Group handled on the day. In addition to the total record for the Agent Group, the information is also given by Agent basis.
Weekly	Total	Shows the statistics of all calls that the call centre handled on the week. In addition to the total record for the week, the information is also given by daily basis.
	Group	Shows the statistics of all calls that a specific Agent Group handled on the week. In addition to the total record for the week, the information is also given by daily basis.
	Agent	Shows the statistics of all calls that a specific Agent handled on the week. In addition to the total record for the week, the information is also given by daily basis.
Monthly	Total	Shows the statistics of all calls that the call centre handled on the month. In addition to the total record for the month, the information is also given by weekly basis.
	Group	Shows the statistics of all calls that a specific Agent Group handled on the month. In addition to the total record for the month, the information is also given by weekly basis.
	Agent	Shows the statistics of all calls that a specific Agent handled on the month. In addition to the total record for the month, the information is also given by weekly basis.
Daily (hour)	Total	Shows the statistics of calls that the call centre handled on the day by hourly basis.
	Group	Shows the statistics of calls that a specific Agent Group handled on the day by hourly basis.
	Agent	Shows the statistics of calls that a specific Agent handled on the day by hourly basis.

◆ Report Type: Daily

Report Type: Daily Total

Daily Report (Total)				Printed 2001/03/23 PM12:09:08			
				Period 2001/3/19	12:00:00 - 2001/3/19	11:59:59	1/1
Group	Total	Group01	Group02				
Total Calls	16	11	5				
Outgoing Calls	1	0	1				
Incoming Answered Calls	7	5	2				
Incoming ACD Lost Calls	4	2	2				
Incoming Agent Lost Calls	4	4	0				
Lost%	53%	54%	50%				
Login Duration	0:00:00	0:00:00	0:00:00				
Busy Time	0:00:00	0:00:00	0:00:00				
Wrap-up Time	0:00:00	0:00:00	0:00:00				
Idle Time	0:00:00	0:00:00	0:00:00				
Break Time	0:00:00	0:00:00	0:00:00				
Idle%	0%	0%	0%				
Incoming Talk Time	0:01:06	0:00:47	0:00:19				
Average Incoming Talk Time	0:00:09	0:00:09	0:00:09				
Outgoing Talk Time	0:00:15	0:00:00	0:00:15				
Average Outgoing Talk Time	0:00:15	0:00:00	0:00:15				
Longest Talk Time	0:00:18	0:00:12	0:00:18				
Average Wait Time	0:00:04	0:00:03	0:00:08				
Longest Wait Time	0:00:12	0:00:05	0:00:12				
Average ACD Lost Wait Time	0:00:10	0:00:10	0:00:10				
Average Agent Lost Wait Time	0:00:08	0:00:08	0:00:00				
Longest ACD Lost Wait Time	0:00:11	0:00:11	0:00:11				
Longest Agent Lost Wait Time	0:00:12	0:00:12	0:00:00				

Report Type: Daily Group

Daily Report (Group) : Group01							Printed 2001/03/23 PM12:09:11			
							Period 2001/3/19	12:00:00 - 2001/3/19	11:59:59	1/1
Agents ID	Average	Total	agent 1 0	agent 2 sh 2345678901	agent 4 4	agent 5 5				
Total Calls	2	9	2	1	1	5				
Outgoing Calls	0	0	0	0	0	0				
Incoming Answered Calls	1	5	1	1	0	3				
Incoming Agent Lost Calls	1	4	1	0	1	2				
Lost%	44%	44%	50%	0%	100%	40%				
Login Time	-----	-----	-----	-----	-----	-----				
Logout Time	-----	-----	-----	-----	-----	-----				
Login Duration	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00				
Busy Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00				
Wrap-up Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00				
Idle Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00				
Break Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00				
Idle%	0%	0%	0%	0%	0%	0%				
Incoming Talk Time	0:00:11	0:00:47	0:00:12	0:00:09	0:00:00	0:00:26				
Average Incoming Talk Time	0:00:09	0:00:09	0:00:12	0:00:09	0:00:00	0:00:08				
Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00				
Average Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00				
Longest Talk Time	0:00:12	0:00:12	0:00:12	0:00:09	0:00:00	0:00:11				
Average Wait Time	0:00:03	0:00:03	0:00:05	0:00:03	0:00:00	0:00:03				
Longest Wait Time	0:00:05	0:00:05	0:00:05	0:00:03	0:00:00	0:00:05				
Average Agent Lost Wait Time	0:00:08	0:00:08	0:00:06	0:00:00	0:00:12	0:00:07				
Longest Agent Lost Wait Time	0:00:12	0:00:12	0:00:06	0:00:00	0:00:12	0:00:09				

◆ **Report Type: Weekly**

Report Type: Weekly Total

Weekly Report (Total)								Printed 2001/03/23 PM12:09:26
Period 2001/03/13 - 2001/03/19								
Date	3/13	3/14	3/15	3/16	3/17	3/18	3/19	Total
Total Calls	0	0	0	0	0	0	16	16
Outgoing Calls	0	0	0	0	0	0	1	1
Incoming Answered Calls	0	0	0	0	0	0	7	7
Incoming ACD Lost Calls	0	0	0	0	0	0	4	4
Incoming Agent Lost Calls	0	0	0	0	0	0	4	4
Lost%	0%	0%	0%	0%	0%	0%	53%	53%
Login Duration	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Busy Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Wrap-up Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Idle Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Break Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Idle%	0%	0%	0%	0%	0%	0%	0%	0%
Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:01:06	0:01:06
Average Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:09	0:00:09
Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:15	0:00:15
Average Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:15	0:00:15
Longest Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:18	0:00:18
Average Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:04	0:00:04
Longest Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12
Average ACD Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:10	0:00:10
Average Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:08	0:00:08
Longest ACD Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:11	0:00:11
Longest Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12

Report Type: Weekly Group

Weekly Report (Group)			Group01				Printed 2001/03/23 PM12:09:29		
							Period 2001/03/13 - 2001/03/19		
Date	3/13	3/14	3/15	3/16	3/17	3/18	3/19	Total	
Total Calls	0	0	0	0	0	0	11	11	
Outgoing Calls	0	0	0	0	0	0	0	0	
Incoming Answered Calls	0	0	0	0	0	0	5	5	
Incoming ACD Lost Calls	0	0	0	0	0	0	2	2	
Incoming Agent Lost Calls	0	0	0	0	0	0	4	4	
Lost%	0%	0%	0%	0%	0%	0%	54%	54%	
Login Duration	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Busy Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Wrap-up Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Idle Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Break Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Idle%	0%	0%	0%	0%	0%	0%	0%	0%	
Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:47	0:00:47	
Average Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:09	0:00:09	
Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Average Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Longest Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12	
Average Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:03	0:00:03	
Longest Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:05	0:00:05	
Average ACD Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:10	0:00:10	
Average Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:08	0:00:08	
Longest ACD Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:11	0:00:11	
Longest Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12	

Report Type: Weekly Agent

Weekly Report (Agent)		agent1 (0)					Printed 2001/03/23 PM12:09:33 Period 2001/03/13 - 2001/03/19		
Date	3/13	3/14	3/15	3/16	3/17	3/18	3/19	Total	
Total Calls	0	0	0	0	0	0	2	2	
Outgoing Calls	0	0	0	0	0	0	0	0	
Incoming Answered Calls	0	0	0	0	0	0	1	1	
Incoming Agent Lost Calls	0	0	0	0	0	0	1	1	
Lost%	0%	0%	0%	0%	0%	0%	50%	50%	
Login Time	-----	-----	-----	-----	-----	-----	-----	-----	
Logout Time	-----	-----	-----	-----	-----	-----	-----	-----	
Login Duration	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Busy Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Wrap-up Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Idle Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Break Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Idle%	0%	0%	0%	0%	0%	0%	0%	0%	
Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12	
Average Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12	
Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Average Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Longest Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12	
Average Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:05	0:00:05	
Longest Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:05	0:00:05	
Average Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:06	0:00:06	
Longest Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:06	0:00:06	

◆ **Report Type: Monthly****Report Type: Monthly Total**

Monthly Report (Total)						Printed 2001/03/23 PM12:09:36
						Period 2001/02/20 - 2001/03/19
Date	2/20 - 2/26	2/27 - 3/ 5	3/ 6 - 3/12	3/13 - 3/19	Total	
Total Calls	0	0	0	16	16	
Outgoing Calls	0	0	0	1	1	
Incoming Answered Calls	0	0	0	7	7	
Incoming ACD Lost Calls	0	0	0	4	4	
Incoming Agent Lost Calls	0	0	0	4	4	
Lost%	0%	0%	0%	53%	53%	
Login Duration	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Busy Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Wrap-up Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Idle Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Break Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Idle%	0%	0%	0%	0%	0%	
Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:01:06	0:01:06	
Average Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:09	0:00:09	
Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:15	0:00:15	
Average Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:15	0:00:15	
Longest Talk Time	0:00:00	0:00:00	0:00:00	0:00:18	0:00:18	
Average Wait Time	0:00:00	0:00:00	0:00:00	0:00:04	0:00:04	
Longest Wait Time	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12	
Average ACD Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:10	0:00:10	
Average Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:08	0:00:08	
Longest ACD Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:11	0:00:11	
Longest Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12	

Report Type: Monthly Group

Monthly Report (Group)		Group01				Printed 2001/03/23 PM12:09:40
						Period 2001/02/20 - 2001/03/19
Date	2/20 - 2/26	2/27 - 3/ 5	3/ 6 - 3/12	3/13 - 3/19	Total	
Total Calls	0	0	0	11	11	
Outgoing Calls	0	0	0	0	0	
Incoming Answered Calls	0	0	0	5	5	
Incoming ACD Lost Calls	0	0	0	2	2	
Incoming Agent Lost Calls	0	0	0	4	4	
Lost%	0%	0%	0%	54%	54%	
Login Duration	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Busy Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Wrap-up Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Idle Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Break Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Idle%	0%	0%	0%	0%	0%	
Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:47	0:00:47	
Average Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:09	0:00:09	
Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Average Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	
Longest Talk Time	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12	
Average Wait Time	0:00:00	0:00:00	0:00:00	0:00:03	0:00:03	
Longest Wait Time	0:00:00	0:00:00	0:00:00	0:00:05	0:00:05	
Average ACD Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:10	0:00:10	
Average Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:08	0:00:08	
Longest ACD Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:11	0:00:11	
Longest Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12	

Report Type: Monthly Agent

Monthly Report (Agent)		agent 1 (0)				Printed 2001/03/23 PM12:09:43 Period 2001/02/20 - 2001/03/19	
Date	2/20 - 2/26	2/27 - 3/ 5	3/ 6 - 3/12	3/13 - 3/19	Total		
Total Calls	0	0	0	2	2		
Outgoing Calls	0	0	0	0	0		
Incoming Answered Calls	0	0	0	1	1		
Incoming Agent Lost Calls	0	0	0	1	1		
Lost%	0%	0%	0%	50%	50%		
Login Duration	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00		
Busy Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00		
Wrap-up Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00		
Idle Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00		
Break Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00		
Idle%	0%	0%	0%	0%	0%		
Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12		
Average Incoming Talk Time	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12		
Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00		
Average Outgoing Talk Time	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00		
Longest Talk Time	0:00:00	0:00:00	0:00:00	0:00:12	0:00:12		
Average Wait Time	0:00:00	0:00:00	0:00:00	0:00:05	0:00:05		
Longest Wait Time	0:00:00	0:00:00	0:00:00	0:00:05	0:00:05		
Average Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:06	0:00:06		
Longest Agent Lost Wait Time	0:00:00	0:00:00	0:00:00	0:00:06	0:00:06		

◆ Report Type: Daily (hour)

Report Type: Daily Total (hour)

Daily Total (hour)		Printed 2001/03/23 PM12:09:15											
		Period 2001/03/19 12:00:00 - 2001/03/19 11:59:59											
Time		0:00	1:00	2:00	3:00	4:00	5:00	6:00	7:00	8:00	9:00	10:00	11:00
Total Calls		0	0	0	0	0	0	0	0	0	0	1	9
Outgoing Calls		0	0	0	0	0	0	0	0	0	0	0	1
Incoming Answered Calls		0	0	0	0	0	0	0	0	0	0	0	4
Incoming ACD Lost Calls		0	0	0	0	0	0	0	0	0	0	0	4
Incoming Agent Lost Calls		0	0	0	0	0	0	0	0	0	0	1	0
Lost%		0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	50%
Time		12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Total Calls		0	1	5	0	0	0	0	0	0	0	0	0
Outgoing Calls		0	0	0	0	0	0	0	0	0	0	0	0
Incoming Answered Calls		0	0	3	0	0	0	0	0	0	0	0	0
Incoming ACD Lost Calls		0	0	0	0	0	0	0	0	0	0	0	0
Incoming Agent Lost Calls		0	1	2	0	0	0	0	0	0	0	0	0
Lost%		0%	100%	40%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Report Type: Daily Group (hour)

Daily Group (hour)		Group01												Printed 2001/03/23 PM12:09:18	
		Period 2001/03/19 12:00:00 - 2001/03/19 11:59:59													
Time		0:00	1:00	2:00	3:00	4:00	5:00	6:00	7:00	8:00	9:00	10:00	11:00		
Total Calls		0	0	0	0	0	0	0	0	0	0	1	4		
Outgoing Calls		0	0	0	0	0	0	0	0	0	0	0	0		
Incoming Answered Calls		0	0	0	0	0	0	0	0	0	0	0	2		
Incoming ACD Lost Calls		0	0	0	0	0	0	0	0	0	0	0	2		
Incoming Agent Lost Calls		0	0	0	0	0	0	0	0	0	0	1	0		
Lost%		0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	50%		
Time		12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00		
Total Calls		0	1	5	0	0	0	0	0	0	0	0	0		
Outgoing Calls		0	0	0	0	0	0	0	0	0	0	0	0		
Incoming Answered Calls		0	0	3	0	0	0	0	0	0	0	0	0		
Incoming ACD Lost Calls		0	0	0	0	0	0	0	0	0	0	0	0		
Incoming Agent Lost Calls		0	1	2	0	0	0	0	0	0	0	0	0		
Lost%		0%	100%	40%	0%	0%	0%	0%	0%	0%	0%	0%	0%		

Report Type: Daily Agent (hour)

Daily Agent (hour)		agent 2 short nameyo (23456789012345678901)												Printed 2001/03/23 PM12:09:22	
Login/Logout Time : ----- - -----		Period 2001/03/19 12:00:00 - 2001/03/19 11:59:59													
Time	0:00	1:00	2:00	3:00	4:00	5:00	6:00	7:00	8:00	9:00	10:00	11:00			
Total Calls	0	0	0	0	0	0	0	0	0	0	0	0	1		
Outgoing Calls	0	0	0	0	0	0	0	0	0	0	0	0	0		
Incoming Answered Calls	0	0	0	0	0	0	0	0	0	0	0	0	1		
Incoming Agent Lost Calls	0	0	0	0	0	0	0	0	0	0	0	0	0		
Lost%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
Time	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00			
Total Calls	0	0	0	0	0	0	0	0	0	0	0	0	0		
Outgoing Calls	0	0	0	0	0	0	0	0	0	0	0	0	0		
Incoming Answered Calls	0	0	0	0	0	0	0	0	0	0	0	0	0		
Incoming Agent Lost Calls	0	0	0	0	0	0	0	0	0	0	0	0	0		
Lost%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		

Description of items for each Report Type (T: Total, G: Group, A: Agent):

Item	Description	Report Type		
		Daily T/G	Weekly T/G/A, Monthly T/G/A	Daily T/G/A (hour)
Total Calls	Shows the total number of calls handled by the call centre.	✓	✓	✓
Outgoing Calls	Shows the total number of outgoing calls.	✓	✓	✓
Incoming Answered Calls	Shows the total number of incoming calls answered.	✓	✓	✓
Incoming ACD Lost Calls	Shows the total number of calls that were disconnected without being answered.	✓ Total only	✓ Total and Group only	✓ Total and Group only
Incoming Agent Lost Calls	Shows the total number of incoming calls that were disconnected without being answered after they were distributed to Agents.	✓	✓	✓
Lost %	Shows the percentage of lost calls to the total number of calls.	✓	✓	✓
Login Time	Shows the time at which the Agent logged in to CMS.	✓ Group only	✓ Agent only	
Logout Time	Shows the time at which the Agent logged out from CMS.	✓ Group only	✓ Agent only	
Login Duration	Shows the total length of time that the Agent was logged in to CMS.	✓	✓	
Busy Time	Shows the total length of time that the Agent(s) was (were) in busy status.	✓	✓	
Wrap-up Time	Shows the total length of time that the Agent(s) was (were) in wrap-up status.	✓	✓	
Idle Time	Shows the total length of time that the Agent(s) was (were) in idle status.	✓	✓	
Break Time	Shows the total length of time that the Agent(s) was (were) in break status.	✓	✓	
Idle %	Shows the proportion of time that the Agent(s) was (were) in idle status to the total login time.	✓	✓	
Incoming Talk Time	Shows the total length of time that the Agent(s) was (were) in conversation with incoming calls.	✓	✓	

Item	Description	Report Type		
		Daily T/G	Weekly T/G/A, Monthly T/G/A	Daily T/G/A (hour)
Average Incoming Talk Time	Shows the average length of time that the Agent(s) was (were) in conversation with incoming calls.	✓	✓	
Outgoing Talk Time	Shows the total length of time that the Agent(s) was (were) in conversation with outgoing calls.	✓	✓	
Average Outgoing Talk Time	Shows the average length of time that the Agent(s) was (were) in conversation with outgoing calls.	✓	✓	
Longest Talk Time	Shows the longest length of time that that the Agent(s) was (were) in conversation.	✓	✓	
Average Waiting Time	Shows the average length of time that the calls were held in the ACD Queue.	✓	✓	
Longest Waiting Time	Shows the length of time that a call was held in the ACD Queue the longest.	✓	✓	
Average ACD Lost Wait Time	Shows the average length of time that the lost calls waited in the ACD Queue.	✓ Total only	✓ Total and Group only	
Average Agent Lost Waiting Time	Shows the average length of time that the lost calls waited in the ACD Queue after they were distributed to Agents.	✓	✓	
Longest ACD Lost Wait Time	Shows the length of time that a lost call waited in the ACD Queue the longest.	✓ Total only	✓ Total and Group only	
Longest Agent Lost Waiting Time	Shows the length of time that a lost call waited in the ACD Queue the longest after it was distributed to an Agent.	✓	✓	

5.1.2 Printing Out the Report

This section describes how to print (or export) reports. There are 2 reporting methods: manual and automatic. The manual printing allows you to print or export the desired report whenever as required. The automatic printing allows you to schedule print job(s) for automatic printing of report(s).

From the tool bar, choose **Functions** → **Report Manager**.

Schedule	Day / Week	Time	Type
Daily		23:59	Daily Call Log
Daily		23:59	Daily Total
Daily		23:59	Daily Group
Daily	(00:00-23:59) - 24H	23:59	Daily Total (hourly)
Daily	(00:00-23:59) - 24H	23:59	Daily Group (hourly)

◆◆ Printing or exporting reports manually

1. In "Manual", specify the type of the report in **Report Type** (for details about each type of report, see "5.1.1 Report Type").
2. Do the following:
 - To generate the report until the current time of the current day, **go directly to step 3.**
 - To generate the hourly report, specify the start time and end time (in hour) of the reporting time range in **Hourly Report Time Period**.
If left unspecified, the reporting time range will be considered as 0-23 (default).
 - To generate the report for a specific day or week/month period:

- 1) Click **Select Date** to open the Select Date screen.

The screenshot shows a 'Select Date' dialog box with a title bar containing a close button (X). Inside, there are two spinners for 'Year' (set to 2001) and 'Month' (set to 3). Below these is a calendar grid with days of the week (Su, M, Tu, W, Th, F, Sa) as column headers. The dates 1 through 31 are displayed in the grid, with the 31st highlighted in yellow. At the bottom, there is a 'Period' text box containing '2001/03/01 - 2001/03/31' and two buttons: 'OK' and 'Cancel'.

- 2) Choose the year (**1970-2038**) and month (**1-12**), then click the desired **date** in the calendar. The **Period** field will automatically reflect the specified reporting period.
When generating a Weekly or Monthly Report, keep in mind that the selected date will be considered as the last day of the reporting period (week or month).

3. Do one of the following:

- To print out the report, click **Print**.
- To export the report:

- 1) Click **Export**.

- 2) Specify the folder in which you want to save the file. Click **Save** after entering the file name.

- 3) Click **OK** to the confirmation message box.

For details about items contained in the report, see "Description of items for each Report Type" in "5.1.1 Report Type".

◆◆ **Printing reports automatically**

You can schedule print job(s) on a daily, weekly, and monthly basis. When more than one print job has been scheduled, CMS will sequentially execute them from the top to the bottom of the list.

1. In "Auto", do one of the following:

- To set a daily schedule, check **Daily**.

To set reporting time range, specify the start time and end time (in hour) of the reporting time range in Hourly Report Time Period.

If left unspecified, the reporting time range will be considered as 0-23 (default).

- To set a weekly schedule, check **Weekly** and select the **day** on which to print the report.
The selected day will be considered as the last day of the reporting period (week).
- To set a monthly schedule, check **Monthly** and select the **date** on which to print the report.
The selected date will be considered as the last day of the reporting period (month).

2. Specify the time at which to start automatic printing in **Print Time (00:00-23:59)**.
3. Specify the type of the report in **Report Type** (for details about each type of report, see "5.1.1 Report Type").
4. Do one of the following:
 - To add the print job as the last entry to the list, click **Add**.
 - To add the print job to a specific position in the list, select an existing print job in the list and click **Insert**. The new print job will be added above the selected print job.
5. Click **OK** to save the setting. The Report Manager screen closes.

◆ **To delete a scheduled print job:**

1. In "Auto", select the desired print job from the list.
To delete all print jobs, ignore this step.
2. Click **Delete**. A confirmation dialogue box appears.
3. Do one of the following:
 - Click **Select** to delete the selected print job.
 - Click **All** to delete all print jobs.
 - Click **Cancel** to cancel deleting.

Section 6

Appendix

6.1 Troubleshooting

6.1.1 Troubleshooting

If the system does not operate properly, the following error messages will appear. Follow the appropriate instructions below to solve the problems (when messages other than the ones described below appear, consult your dealer).

◆ System Error

Error Message	Possible Cause (bold) and Solution
System error occurs. Restart the application.	Due to the system error in PBX 1. Reboot the application. 2. If the solution 1 does not work properly, reboot the OS. 3. If the above solutions do not work properly, consult your dealer.

◆ Database Error

Error Message	Possible Cause (bold) and Solution
The error of the Log database occurs.	Check the disk after copying all files in the Datafile directory to a spare disk.
You can't open tables more.	Check the disk after copying all files in the Datafile directory to a spare disk.
There is the possibility that the disk is damaged. Please retry after solving problems.	Check the disk after copying all files in the Datafile directory to a spare disk.
Please redo after increasing free space by deleting some of the starting files.	Due to lack of disk capacity You cannot save the data. Immediately delete unnecessary files.
Please redo after deleting some of the log data.	Due to lack of disk capacity You cannot save the data. Immediately delete unnecessary files.
There is the possibility that the disk is damaged.	Check the disk after copying all files in the Datafile directory to a spare disk.
Please redo after deleting some of the data.	Due to lack of disk capacity You cannot save the data. Immediately delete unnecessary files.

◆ File Error

Error Message	Possible Cause (bold) and Solution
The specified path is wrong. Please confirm the path.	The path has been specified inappropriately. Specify another path again.
You can't open files any more. Please try again after closing some files.	Due to lack of disk capacity You cannot save the data. Immediately delete unnecessary files.
You can't access. It is a write-protect or read-only file.	Because of the file being set as "read-only". Change the setting to "read-write".
You can't delete the current directory under working.	Because of trying to delete a directory being used Delete after closing CMS.

◆ Image Edit Error

Error Message	Possible Cause (bold) and Solution
The specified image is not supported.	Use the BMP or JPEG format regulated by Windows.
The specified compression format is not supported.	Use the BMP or JPEG format regulated by Windows.

◆ Memory Error

Error Message	Possible Cause (bold) and Solution
The memory is not enough. Please exit some of the running applications.	Due to lack of memory capacity Close all unnecessary applications; otherwise, CMS might go down due to an unexpected error.

◆ Copy Error

Error Message	Possible Cause (bold) and Solution
There is not enough memory. The creation of option screen ended in failure.	Due to lack of memory capacity Close all unnecessary applications; otherwise, CMS might go down due to an unexpected error.

6.2 Quick Reference Guide

6.2.1 Quick Reference Guide

Panasonic

Call Centre Management Software

Quick Reference Guide

Model KX-A296/KX-A297

Introduction

This Quick Reference Guide is designed specifically for use by Agents during operation. It provides information about how to use the Digital Proprietary Telephone (DPT) to use the following functions:

Using your DPT, you can:

- **Log in**¹ to Agent Group.
You must first log in to an Agent Group before starting operation. (You can either log in to the default or a specific Agent Group.)

- **Log out**¹ from Agent Group.
Log out from the Agent Group when finishing operation. (You can either log out from the default or a specific Agent Group.)

- **Enter Break mode.**
While in Break mode, you can temporarily refuse calls without logging out from your Agent Group.

- **Leave Break mode.**
You can leave Break mode to start accepting calls again.

- **Enter Result Codes**².
During Wrapup Time (i.e., a period of time reserved after each call for note taking), you can enter a Result Code that specifies the result of a call.

¹: Your Supervisor can also change your Login/Logout status.
²: Result Codes are specified by your Supervisor.

In this manual, the suffix of each model number is omitted.

Note: For safety precautions when using your DPT and more detailed instructions about how to use it, please refer to its manual.

DPT Operation

Off-hook On-hook System Code Delimiter button Store button

Notes:

- Feature numbers depend on the setting with your telephone system. Consult your Supervisor for the Feature numbers.
- The illustrations of buttons may look slightly different from the actual buttons on your DPT.

Desired Function	Operation
Logging In	> [feature number] > <div><div>To the default Agent Group [1][0]</div><div>To a specific Agent Group [1][2] > [group number (1-16)]</div></div>
Logging Out	> [Agent ID] > * > <div><div><If required></div><div>[password]</div></div> > # > <div><div>From the default Agent Group [1][1]</div><div>From a specific Agent Group [1][3] > [group number (1-16)]</div></div>
Entering/Leaving Break Mode	> [feature number] > <div><div>To enter Break Mode [2][0]</div><div>To leave Break Mode [2][1]</div></div> > # >
Entering Result Codes	> [feature number] > <div><div>[5][0] to [9][9]</div></div> > # > Enter the desired Result Code.

Hand this QRG to the Supervisor or Agents.

Section 7

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